

Please be reminded pursuant to Section 3 of Article X of the Bylaws, no member of the Board shall cast a vote on any matter on which he or she has a conflict of interest as defined by federal or state law. Upon discovery of an actual or potential conflict of interest, the Board Member shall promptly disclose the actual or potential conflict of interest, promptly file a written statement of disqualification, shall withdraw from any further participation in the transaction involved, and shall abstain from voting on the matter. In the event of such disclosure or abstention, Article IX Section 3 shall govern the voting requirements on such matter.

Executive Committee Meeting Agenda

February 16, 2023 – 9:00 a.m.

Join the meeting via Microsoft Teams

Committee Members

Mark Barry, Mark Earl, Charles Gibbons, Joelle Neri, Lex Smith

Call to orderJoelle Neri, Vice Chair

Public Comments

No requests from the public were received during the allotted time published in the Public Notice.

Action Items

1. Minutes from August 18, 2022, Executive Committee Meeting (Joelle Neri) Page 2
2. Increase ITA Amount (Jerome Salatino) Page 5
3. Training Services – FleetForce Truck Driving School (Brenda Gause) Page 7
4. Training Services – Computer Coach Training Center (Brenda Gause) Page 238
5. Transfer of WIOA DW Funding to WIOA AD Funds (Jerome Salatino) Page 240
6. Additional Key Positions (Jerome Salatino) Page 242

Information Items

1. Financial Reports (Theresa Miner) Page 243

Chair Comments

CEO Comments

Adjournment



ACTION ITEM 1
Approval of Minutes

In accordance with Article VI, Section 2 of the approved bylaws, the Board is required to keep correct and complete minutes of the proceedings of any Board or Committee meeting.

Draft minutes of the August 18, 2022, Executive Committee Meeting are presented for review. Any modifications should be requested prior to approval.

FOR CONSIDERATION

Approval of August 18, 2022, Executive Committee Meeting Minutes, to include any modifications or changes noted by the Committee.

Executive Committee Meeting Minutes - DRAFT

August 18, 2022 – 10:00 a.m.

Committee Members

Present: Mark Barry, Mark Earl, Chuck Gibbons, Joelle Neri, Lex Smith

Absent: None

Quorum Present: Yes

Others Present:

PHWB Staff – Brenda Gause, Dave Hamilton, Theresa Miner, Kenneth Russ, Jerome Salatino, Ania Williams

The Hogan Law Firm – Jennifer Rey

Pasco County – Steven Smith

GoGig – Chris Hodges and Casey Patton

Proceedings:

Meeting called to order at 10:00 a.m. by Chuck Gibbons

Public Comments

No public comments were received.

Action Item 1 – Approval of May 12, 2022, Executive Committee Meeting Minutes

Chuck Gibbons asked the Committee members to review the minutes from the May 12, 2022 Executive Committee meeting for any corrections or comments. Hearing none, a motion was made to accept the minutes of the meeting.

MOTION was made by Mark Earl and seconded by Joelle Neri to approve the minutes. MOTION carried 5-0.

Action Item 2 – Budget

Committee members reviewed the operating budget for program year 2022-2023. This budget, with approval from the Executive Committee, will be sent to the Board of County Commissioners for their approval. The fully approved budget will be sent to the state to meet their October 1 deadline.

MOTION was made by Mark Barry and seconded by Joelle Neri to approve the budget. MOTION carried 5-0.

Action Item 3 – Gulf Coast Contract Amendment

The Committee reviewed the request to approve the contract amendment for Gulf Coast Jewish Family and Community Services. The state funding for services to the Non-Custodial Parents has increased from \$250,000 to \$500,000 for the 2022-23 program year.

MOTION was made by Lex Smith and seconded by Mark Earl to approve the contract amendment. MOTION carried 5-0.

Action Item 4 – Local Workforce Plan Two-Year Modification

The Committee reviewed the Local Workforce Plan Modification prior to being submitted to the Pasco and Hernando County Chief Elected Officials for approval. The approved plan will be sent to CareerSource Florida to meet their October 3 deadline.

MOTION was made by Mark Barry and seconded by Lex Smith to approve the Local Workforce Plan Two-Year Modification as is. MOTION carried 5-0.

Action Item 5 – Training Provider Renewal

The Committee reviewed the request to add Ultimate Medical Academy to the training provider list for the 2022-2023 program year and to enter into an Occupational Skills Service Provider Agreement.

MOTION was made by Mark Barry and seconded by Lex Smith to approve the training provider and enter into a service provider agreement. MOTION carried 5-0.

Action Item 6 – Board Candidate

The Committee reviewed the recommendation for Matthew Maggard for presentation to the Pasco County Board of County Commissioners for appointment to the Pasco-Hernando Workforce Board. Mr. Maggard has been nominated to fill the vacancy under the business sector.

MOTION was made by Mark Earl and seconded by Joelle Neri to recommend the approval of Matthew Maggard for appointment to the Board. MOTION carried 5-0.

Information Item 1 – GoGig Presentation

Jerome Salatino spoke about the GoGig Platform as an enhancement to our labor exchange system.

Information Item 2 – Office Closure

Jerome Salatino informed the committee members of an upcoming office closure on September 26, 2022 for staff training purposes.

Discussion Item 1 – Severance Package

Jerome Salatino discussed layoff and severance policy options along with its requirements and limitations.

With no further business to discuss, the meeting adjourned.

ACTION ITEM 2

Increase ITA Amount

Training services, when determined appropriate, must be provided either through an Individual Training Account (ITA) or through a training contract discussed in Section 8 of this TEGL. Except in certain instances listed in WIOA sec. 122(h) and 20 CFR sec. 680.320, training services must be provided by an Eligible Training Provider (ETP) in accordance with WIOA sec. 122(d).

Training is available through a State Eligible Training Provider and Program List (ETPL), comprised of entities determined eligible to receive funds through WIOA title I, subtitle B, according to the Governor's eligibility criteria and procedure. As described in TEGL 41-14 (https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=5816), the State ETPL ensures the accountability, quality and labor-market relevance of programs, and ensures informed customer choice for individuals eligible for training. WIOA also provides enhanced access and flexibility for work-based training options, such as Registered Apprenticeship (RA), on-the-job training, customized training, and incumbent worker training.

§ 663.420 - Can the duration and amount of ITA's be limited?

- (a) Yes, the State or **Local Board** may impose limits on ITA's, such as limitations on the dollar amount and/or duration.
- (b) Limits to ITA's may be established in different ways:
 - (1) There may be a limit for an individual participant that is based on the needs identified in the individual employment plan; or
 - (2) There may be a **policy decision** by the State Board or **Local Board** to establish a range of amounts and/or a **maximum amount applicable to all ITA's**.
- (c) Limitations established by State or Local Board policies must be described in the State or Local Plan, respectively, but should not be implemented in a manner that undermines the Act's requirement that training services are provided in a manner that maximizes customer choice in the selection of an eligible training provider. ITA limitations may provide for exceptions to the limitations in individual cases.
- (d) An individual may select training that costs more than the maximum amount available for ITAs under a State or local policy when other sources of funds are available to supplement the ITA. These other sources may include: Pell Grants; scholarships; severance pay; and other sources.

Staff is seeking Local Board approval of an ITA amount that will allow the region to assist customers in selected sectors that might require increased funding (our current ITA is \$6,000). This increased amount not only applies to traditional classroom training but to On the Job and Employed Worker Training.

FOR CONSIDERATION

Approval to increase the ITA limit to \$10,000 on a case-by-case basis as funding and suitability allows. If ITA limit is exceeded, this amount would be subject to approval by CEO or designated management staff.

ACTION ITEM 3

Training Services – FleetForce Truck Driving School

The Pasco-Hernando Workforce Board, Inc. (PHWB) has issued a Request for Proposal (RFP) to solicit organizations with the expertise and demonstrated capacity to recruit and provide Occupational Skills Training that results in permanent employment at or above \$15.50/per hour. The training sought is in Information Technology, Healthcare, Construction and/or Warehousing & Transportation occupational sectors. Training is to average 12 weeks in duration and not exceed 16 weeks, in order to effectively and efficiently provide training and training related services in Pasco and Hernando counties using Workforce Innovation and Opportunity Act (WIOA) funds. Services are to be provided from mid-February 2023 through June 30, 2023. PHWB reserves the option to extend any contract awarded for two additional one-year periods contingent on funding availability.

The following training providers submitted proposals to RFP # 01-01042023 WIOA AD/DW WT:

- Computer Coach Training Center
- FleetForce Truck Driving School
- New Horizons – Tampa

Three PHWB management staff were selected to rate the submitted proposals. Proposals and rating sheets are included for review. Staff would like to enter into contracts with FleetForce Truck Driving School and Computer Coach as they scored the highest and had the most informative proposals. New Horizons' proposal lacked attention to detail, formatting, and consistency. Both providers will be eligible to renew contract for up to two additional years if performance is met and contingent upon funding availability.

FOR CONSIDERATION

Approval to enter into a contract for Short Term Training Services with FleetForce Truck Driving School with a budget of up to \$527,000* if all terms in contract are met.

***FleetForce has requested additional job placement incentives at \$325/completed participant amount not included in budget.**

Provider:	Training Sector:	Budget:	Total In-Kind Resources:	Number of Trainees:	Length of Training:	Certification/ Program:	Average Score:	Notes:
Computer Coach	Information Technology	\$400,000	\$102,080	56	4-12 weeks	Help Desk Tech, Digital Mktg, Business Project Specialist, Data Analyst, Business Analyst, Front End Development, Cybersecurity Specialist	88	
Fleet Force	Warehousing & Transportation	\$500,000	\$545,000	83	200 hours	CDL A or CDL B	92	Provider has requested additional job placement at \$325/completed participant amount not included in budget.
New Horizons	Information Technology	\$420,000	# not clear	70		Microsoft Office, HR & Leadership, Cyber Security	80	

Provider:	Beth's Rating:	Cheryl's Rating:	Desiree's Rating:	Average:
Computer Coach	90	88	85	87.66666667
Fleet Force	90	87	99	92
New Horizons	95	73	72	80



Pasco-Hernando
Workforce Board, Inc.

**REQUEST FOR PROPOSAL
FOR
Short Term Training for WIOA & WTP Customers
RFP # 01-01042023 WIOA AD/DW_WT**

**REQUEST FOR PROPOSAL
FOR SHORT TERM TRAINING
RFP # 01-01042023 WIOA AD/DW_WT**

TABLE OF CONTENTS

	PAGE
PART I.	GENERAL INFORMATION
A.	Introduction 3
B.	Services Solicited Under this RFP 4
C.	Procurement Timetable 5
D.	Funding Availability 5
E.	Period of Performance & Contract 5
F.	Conditions of RFP 6
G.	Questions & Communication with PHWB 7
PART 2.	SCOPE OF WORK
A.	Targeted Services 8
B.	Contractor Provisions 8
C.	Career Services 9
D.	Service Guidelines 14
E.	Quality Assurance & Continuous Improvement 16
F.	Performance Measures Reporting Requirements 17
PART 3.	PROPOSAL SUBMISSION REQUIREMENTS
A.	Eligible Entities 18
B.	Letter of Intent 18
C.	Proposal Format 19
D.	Proposal Content & Organization 19
E.	Proposal Submission 23
PART 4.	SELECTION PROCESS
A.	Selection Policy 23
B.	Proposal Responsiveness 22
C.	Proposal Review & Evaluation 24
D.	Contract Award 24
E.	Appeal Procedure 25
APPENDIX	
1.	Required Forms, Documentation & Certifications
2.	References
3.	Proposal Evaluation Forms
4.	Performance Goals (Prior two years)

A. Introduction

General Information

Pasco-Hernando Workforce Board, Inc., dba CareerSource Pasco Hernando, hereinafter referred to as PHWB, is a 501(c)(3) not-for-profit organization that is chartered with the provisioning of various services associated with workforce development in Pasco and Hernando counties. As one of 24 Local Workforce Development Boards, PHWB receives federal funding for the operation of several programs including (but not necessarily limited to) those associated with the Workforce Innovation and Opportunity Act (WIOA), the Welfare Transition Program (WTP) and the Wagner-Peyser Act.

Stevens Amendment - The funds related to this agreement are expected to be 100% federal, funded by the United States Department of Labor using WIOA and WTP funds. Contracts awarded under this RFP are NOT expected to exceed \$500,000.

The Pasco-Hernando Workforce Board, Inc. (PHWB) is issuing this Request for Proposal (RFP) to solicit organizations with the expertise and demonstrated capacity to recruit and provide Occupational Skills Training that results in permanent employment at or above \$15.50/per hour. The training sought will be in Information Technology, Healthcare, Construction and or Warehousing & Transportation occupational sectors. Training is to average 12 weeks in duration and not exceed 16 weeks, in order to effectively and efficiently provide training and training related services in Pasco and Hernando counties under Section 129 of Workforce Innovation and Opportunity Act (WIOA). Services would be provided from mid-February 2023 through June 30, 2023. The PHWB reserves the option to extend any contract awarded for two additional one-year periods.

The PHWB is the designated administrative entity and sub-state grantee for Florida Workforce Region 16 and has been chartered by the Governor as the Regional Workforce Development Board. As such, PHWB oversees the planning and implementation of a variety of welfare reform and workforce development programs in Pasco and Hernando Counties. The PHWB is a not-for-profit corporation registered under Section 501(c) (3) of the U.S. Internal Revenue Code. The PHWB is governed by a board of directors comprised of 30 members representing business, education, labor, social services, local government, community-based organizations, and state agencies, in accordance with the federal Workforce Innovation and Opportunity Act (WIOA) and Florida Department of Economic Opportunity (DEO) guidance. The PHWB has professional staff designated to perform administrative and fiscal duties for the Board. Joint oversight is provided through an agreement with the Board of County Commissioners from both Pasco and Hernando Counties.

The vision of the Pasco-Hernando Workforce Board, Inc. is "To serve as a catalyst in the community for promoting self-sufficiency through the development of a quality workforce."

There are currently three (3) career centers: New Port Richey, Brooksville, and Dade City. Staff is also co-located at Health & Human Services and Fred K. Marchman Technical College. Services to job seekers and employers are marketed under the name “CareerSource Pasco Hernando.”

Through this RFP, the PHWB plans to secure WIOA and WTP services that will move the regional workforce investment system forward by focusing on Training, Placement and Retention. The chosen organization will be held accountable for achieving certain standards of performance and must utilize a performance management system that incorporates the principles of continuous improvement.

B. Services Solicited Under This RFP

The objective of this procurement is to select **one (or multiple) entity(ies)** to effectively and efficiently manage and deliver the Occupational Skills Training (OST) solicited in this RFP resulting in permanent employment. Bidders are encouraged to bid on the following services. Services will be provided in Pasco and Hernando Counties. PHWB has the right to select more than one provider for each service. The selected service provider will be required to:

Deliver the following services from the CareerSource Pasco Hernando centers:

- Outreach
- Recruitment
- Assessment
- Career planning
- Counseling
- Gainful employment
- Follow-up and retention
- Meet all performance goals (see Appendix 4 for example)

In addition, the organization will be required to:

- Maintain a high standard of professionalism within the system
- Present the centers under the CareerSource Pasco Hernando brand name
- Nurture a customer service attitude among staff to ensure that services are delivered in an efficient, timely and professional manner

Bidders are expected to rely on public law in the preparation and execution of program services solicited under this RFP. Acceptable proposals will meet the specifications contained in this RFP, the requirements of the Workforce Innovation and Opportunity Act, PHWB’s strategic plan, Temporary Assistance to Needy Families program and all applicable policies and regulations. It is expected that bidders will be proficient in their understanding of workforce development and welfare reform legislation and regulations. Reference copies of the PHWB program plans are available on the Internet at www.careersourcepascohernando.com.

C. Procurement Timetable

<u>Procurement Action</u>	<u>Date</u>
RFP Issued	January 4, 2023
Letter of Intent	January 10, 2023
Q&A Period Ends	January 17, 2023
Q&A Teams Call	January 17, 2023
Proposals Due	January 27, 2023 @ 3:30pm
Proposal Rating Review Meeting	TBD
Proposal Review Committee Meeting	TBD
Board Selection of Contractor	TBD – February 17, 2023 at the earliest
Begin Contract Negotiations	February 20, 2023 at the earliest

All times shown are Eastern Standard Time (EST). 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. **Letter of Intent must contain an email address in order to participate in the Q&A Teams meeting.**

D. Funding Availability

The PHWB will make sufficient funding available from various sources to deliver the services requested in this RFP. The proposer is responsible for proposing a reasonable total cost for delivering the services described in this RFP. Funding during the contract period may be adjusted due to changes in funding received. This funding level does not include other funding resources managed by PHWB (e.g., Wagner-Peyser, Veterans Services, etc.).

E. Period of Performance & Contract

The funding period for contracts awarded under this solicitation are expected to begin in mid to late February 2023 and continue through June 30, 2023, provided performance remains acceptable during that period. Any contract awarded from this RFP will include an option to renew for up to two (2) 1-year periods, contingent upon successful performance and funding availability.

Proposed costs will be analyzed and a contract will be negotiated on a performance-based reimbursement basis. **There will be no contract negotiated with a straight 100% cost-reimbursement payment structure.**

This contract will be a performance-based contract as follows:

1. Determined Cost of the Occupational Skills training – not to exceed \$6,000 per trainee
2. Up to 15% of the cost of the training for outreach and recruitment – not to exceed \$900 per trainee.
 - a. \$300 of this amount will be help back until attainment of 90 days of verified employment. *

*Verified employment using CSPH Employment Verification forms.

For the purposes of responding to this RFP, proposers should develop a line-item budget showing all expected costs associated with delivering the proposed services and a performance payment proposal showing the proposed amount of performance revenue (profit or incentives).

Profit may be earned by commercial (for profit) organizations, depending on the risk involved and provided that profit is reasonable and not excessive. Determination of reasonable profit is at the sole and absolute discretion of PHWB, but in no case may it exceed 10%.

Due to the nature of the funding sources, potential changes in legislation and policies, and performance achieved, proposers 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.

F. Conditions of 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 a 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 de-obligated grant funds to increase the allocations 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.

G. Questions & Communication with PHWB

Written questions regarding this solicitation should be submitted via email no later than January 17, 2023. No questions about the development of proposals will be accepted after January 17, 2023. A summary of the questions and answers will be available on the website at www.careersourcepascohernando.com. A Teams meeting for questions and answer is tentatively scheduled for January 17, 2023

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

Brenda Gause

Email: bgause@careersourcepascohernando.com

Except for the written Q&A, PHWB staff is prohibited from communicating with proposers, and proposers shall not attempt to contact or communicate with staff in any manner regarding any portion of this RFP.

Ex parte communication regarding this solicitation is prohibited between a potential and or current contractor and any PHWB Board member, staff, or any other person serving as an evaluator during this competitive procurement process. Proposers directly contacting Board members, committee members, staff or evaluators risk elimination of their applications from consideration. Correspondence to the public bulletin board on the PHWB Web site does not constitute ex parte communication.

Bidders are required to submit a Letter of Intent no later than January 10, 2023. Failure to meet this requirement could result in the bidder's disqualification from submitting a response.

PART 2: SCOPE OF WORK

A. Targeted Services

Targeted services must be provided to the following customers, as appropriate and within funding/eligibility guidelines:

WIOA Eligible individuals (residents of either Pasco or Hernando County) both Economically Disadvantage Adults (AD) or Dislocated Worker (DW) and or participants in the Welfare Transition Program

- Individuals who meet the requirements for WIOA AD or DW registration and are included in the priority of service categories, who are enrolled in and provided Basic Career services and, in some cases, provided Individualized Career services;
 - All new employment information will be provided on a weekly basis to the Employment Support Center. Additional requirements may be added to the service mix as funds are made available or grants awarded. It is the goal of this system that the delivery of services will be focused on fully integrating a consistent service delivery process and providing excellent customer service, quality career management, and effective job placement to ensure the long-term success of all customers. In order to accomplish this, the Contractor(s) must maintain and continue to improve the integrated, responsive system of service delivery already in place, through the PHWB's CareerSource Pasco Hernando System. Chosen staff of the Provider will work with PHWB staff to ensure paperless system is fully operational. The system currently being used is the Atlas system. All files are to be scanned into the Atlas system, preferably on a daily basis. PHWB staff will provide more guidance as needed.
-

B. Contractor Provisions

1. Staffing

The Contractor must hire qualified programmatic and technical staff with the expertise to meet the goals, objectives and requirements of this RFP. The Contractor also must maintain sufficient staffing levels and coordinate the activities of staff to maximize the efficiency and effectiveness of service delivery.

The experience, abilities, and motivation of the staff play a critical role in the ultimate success of the service delivery. The Contractor shall ensure that:

- Staff are trained as necessary to effectively carry out all activities contracted;
- An ongoing training program that focuses on ensuring that staff acquire the basic competencies of their positions is developed;
- Staff is kept abreast of all new information and processes in a timely manner.

It is required that all staff who have direct customer contact will achieve Tier I certification within six (6) months of hire date or the contract's inception, whichever is later.

C. Career Services

The Contractor must manage and provide the services described below, as well as incorporate the parameters included under the section “Service Guidelines” that follows.

Quoting TEGL 3-15 - WIOA authorizes “career services” for adults and dislocated workers, rather than “core” and “intensive” services, as authorized by WIA. There are three types of “career services”: basic career services, individualized career services, and follow-up services. These services can be provided in any order; there is no sequence requirement for these services. Career services under this approach provide local areas and service providers with flexibility to target services to the needs of the customer.

The three categories of services are:

Basic Career Services

Individualized Career Services

Follow-up Services

Follow-up services must be provided as appropriate for participants who are placed in unsubsidized employment, for up to 12 months after the first day of employment. Counseling about the work place is an appropriate type of follow-up service. Follow-up services do not extend the date of exit in performance reporting.

Other Requirements

A more detailed description of some of the services identified above that are to be managed and provided in each center is enumerated below.

1. Outreach and Recruitment. The Contractor shall be responsible for adequately informing individuals and groups of the services available in the CareerSource Pasco Hernando centers. This outreach and recruitment shall also be conducted in order to attract a sufficient number of individuals who need the services provided and who meet the requirements to receive such services that would allow the agency contracted with in response to this RFP to meet the contract’s measurable performance outcomes.
Outreach and recruitment methods may include formal advertising, use of reciprocal agreements with other agencies, flyers, brochures, word-of-mouth or other methods of program information dissemination. The Contractor must ensure that the outreach and recruitment is conducted within communities where potentially eligible customers reside and through on-going coordinated efforts with other community-based organizations. *Note: All outreach activities, materials, and publications must be approved by PHWB.*

2. Orientation. (In Coordination with CSPH Staff) The Contractor shall provide at each CareerSource Pasco Hernando location general orientations and program specific orientations (i.e., Welfare Transition) that inform individuals of the full array of services available, including non-traditional opportunities and services available from other sources. The general orientation shall include a complete overview of the processes and procedures customers can expect as they are provided services, and should be delivered in self-service and group formats. The Contractor is responsible for ensuring that all program-specific requirements (i.e., obligations and opportunities, sanctions, etc.) are addressed in the all appropriate orientations. The provision of program specific orientation must be documented in the individuals' files.
3. The frequency of delivery of the group orientation sessions shall be included in each center's Master Calendar. All orientations and workshops shall be provided virtually as well as in person. The Contractor is encouraged to develop video or computer-based presentations for the orientations to ensure a consistent message and quality delivery.
4. WIOA/WTP Registration. For this project – **eligibility will be determined by CSPH staff in coordination with the contractor:** This will be negotiated with the successful bidder(s) and added as part of the contract. In general: Registering and determining the priority of service of individuals prior to providing Intensive and Training services with WIOA/WTP funds must be completed in each center. Registration involves certifying and documenting the WIOA eligibility and priority of service of the individuals to be served. This WIOA/WTP eligibility must be completed in accordance with the strict standards established by the State of Florida and USDOL. This includes completing the required state WIOA application, obtaining the necessary documentation (i.e., number in family, family income, residency, etc.), identifying barriers to employment, etc. Proposers should take into consideration that certifying WIOA eligibility and priority of service is a very time-consuming, detailed process, and customers cannot be registered and then provided Intensive or Training services prior to final eligibility certification. In addition, eligibility for WIOA/WTP carries with it liability for dollars spent in serving individuals who are not eligible. PHWB is interested in a paperless system with a majority of staff working remotely in a "call center" atmosphere or from home.
5. Assessment. (In Coordination with CSPH Staff) An initial employment assessment shall be made available to all Universal services customers who are interested in receiving such service. A more comprehensive assessment shall be made available to all customers registered and enrolled in WIOA. Any individual advancing to Training services must have a comprehensive assessment completed prior to receiving a Training scholarship.

A comprehensive assessment shall be a multi-step, systematic process of gathering and evaluating a variety of information on the skills, abilities, interests / values, physical capabilities, work experiences, leisure activities, education and training, needs, work attitude / personality, life situation, family problems, transportation, motivation, behavior patterns, and economic and financial status of a customer. This assessment must be a client-centered, diagnostic evaluation of the participant's barriers to employment, and shall include an identification of other available resources that can be utilized to meet the needs of the customer. Provider should have designated staff that is certified to provide required testing. PHWB staff, in emergencies, may assist with testing.

All customers may not take part in the same sequence or depth of comprehensive assessment activities. The amount and kind of assessment required shall depend largely on the nature of the problems / employment barriers identified during counseling and any prior assessments that have been conducted.

The assessment process may include behavior observation, detailed interviews with the customer, computer-assisted testing, and paper-and-pencil type assessment. On occasion, specialized tests that are more appropriate to the customer may be administered. This is most likely to occur with special populations, such as individuals with disabilities, or when the customer is interested in specialized training that may have program-specific assessments. In all cases, the assessment shall comply with the requirements of WIOA, its regulations and/or any other program specifications.

6. Employment Plan (ISS/IRP): (In Coordination with CSPH Staff) An Employment Plan shall be developed for each registered WIOA customer. This "road map" shall be jointly developed with the customer. The Employment Plan must use the assessment results and will, at a minimum, identify employment and educational goals, describe all employment barriers identified and include the mix, sequence and time-frames of services that should help the customer overcome the barriers identified, supportive services to be provided, and the expected employment outcome(s) or goals. The Employment Plan should also identify the responsibilities of the customer and the career manager. Coordination of services/resources that are available to the client needs to be ongoing with other partners' career managers to ensure that no services are duplicated.

As the needs of the customer change, the Employment Plan shall be modified to reflect these changes. Since the PHWB approach to career management is to provide individualized attention, the customer's changing needs should be identified quickly and a revised action plan developed to meet those needs. This new or revised action plan shall become a modification or addendum to the customer's Employment Plan.

7. Career Management: (In Coordination with CSPH Staff) Within this Region, career management is recognized as a key component of the service delivery plan and critical to the ultimate success of the customers. Career management is necessary to assure that the needs of customers are met and information required for program and performance reporting is collected.

Career management is a process activity that ensures the customer is progressing through the service strategy that was agreed to, and that on-going contact with the customer is maintained throughout the time of participation, upon employment, and following termination.

Career management shall be provided as a customer-focused service delivery strategy designed to assist individuals with multiple needs and barriers. It is both a "customer-driven" and a "systems-driven" human resource development strategy. Career management shall balance sensitivity to the needs, dreams and goals of the customers with a commitment to well-managed, effective and efficient human services program. As a customer-driven strategy, career management must offer an array of interventions designed to address a customer's needs in a holistic and individualized manner.

As a systems-level strategy, career management encourages inter-organizational partnerships (both formal and informal) in order to maximize the proper utilization of human and financial resources and minimize fragmentation, duplication, rigidity and inaccessibility of program services.

Using the career management approach described above, individual customers' needs for specialized services should be recognized almost immediately and additional assistance provided. Through a triage-type approach, career management services shall be provided at the level that the customer and career manager identify a need for such services. Information already collected in the various management information systems shall be reviewed to eliminate any duplication of effort.

10. **Job Placement:** The Contractor will be responsible for providing job listings and referrals to assist customers with finding a job, and coordinate these efforts with CareerSource Pasco Hernando partners. The Contractor is also responsible for providing more intensive job placement assistance to each WIOA customer that is provided career services. This may include coordinating with a local education agency's placement staff if the customer is enrolled in training at that institution, working with the customer directly to provide job leads, specific job development for individual customers, job matching to jobs listed in various job banks, etc. **All eligible participants must be fully registered in EF and follow all CSPH guidelines to ensure these placements are countable placements**

11. **Job Retention / Follow-up:** After job placement, the Contractor will be responsible for assisting the WIOA-registered and other funded customers and their respective employers with job retention. The length of this job retention assistance for WIOA customers will be for at least 12 months. It is the intent of this job retention assistance to help these customers placed into jobs overcome any problems that may arise during this critical period and to ensure further progress toward long-term employment and, therefore, self-sufficiency. This should be accomplished by providing frequent follow-along with the customer and possibly the employer.

The Contractor shall adhere to the following schedule for these follow-up activities for placements:

Length of Employment	# of Minimum Contacts with WIOA Customers and/or Employers
New Hires, 0-4 weeks	1 time per week
5 -12 weeks	1 time per month – total of three contacts
At 26 weeks	1 time – in the 3 weeks prior to the 26 weeks and or one week following the 26 th week

During the retention period, the Contractor must ensure, to the maximum extent possible, that the customer is not unemployed for more than five consecutive workdays and earns an hourly wage not less than the minimum wage.

The Contractor will ensure that staff is focused on helping customers enhance their skills in order to not only retain their jobs, but to take steps to better their skills for career growth. This shall be achieved through a variety of means, including:

- One-on-one counseling during follow-up contacts that will focus on identifying and eliminating any barriers that may be preventing a customer from successfully retaining a job.
- Encouraging customers to attend the seminars on topics related to specific methods for retaining a job, enhancing skills and fostering self-sufficiency.
- Encouraging further career advancement and skill attainment through occupational skills training.
- Considering an incentive package for different phases of employment.

12. **File Maintenance and Documentation: (In Coordination with CSPH Staff)** The Contractor shall be responsible for maintaining a case file for every job-seeker customer that has received Assisted Universal services. That case file can be a combination of the electronic file and a hard copy file as appropriate. However, an electronic file is the preferred method. At a minimum, the case file shall include information on and documentation of each of the following, as applicable: WIOA application, WIOA enrollment form, the initial and comprehensive assessments, the Employment Plan and its updates, school registrations, progress reports, time and attendance, training completion certification, counseling notes, documentation of provision of supportive services, medical documentation, job placement information and job retention verification.

These files are the property of the PHWB and must be turned over to PHWB upon request or at the end of the contract.

The Contractor shall ensure that all customers' files, both hard copy and electronic, are up-to-date and ensure that no more than 3% of the files have out-of-date or incorrect information when monitored by DEO, PHWB or its designee.

13. **Customer Inquiries:** The Contractor shall respond appropriately and in a timely manner to all customer inquiries, including letters, telephone calls, or emails that may have been routed through any partner agency. The Contractor shall establish procedures to manage such customer inquiries and the responses provided.
- a. Phone calls are to be returned within two hours. If circumstances prevent a return call, there should be a system put into place to have another staff member return the calls.
 - b. All emails should be answered on a daily basis. The preferred time will be upon arriving, prior to lunch and before end of day.

14. **Standard Operating Procedures (SOP):** The Contractor shall develop Standard Operating Procedures that ensure all staff, hired as a result of this contract (including subcontractor staff, and all partners located in a CareerSource Pasco Hernando) understand and conduct business on a day-to-day basis in a consistent, appropriate, and professional manner. The SOP must be approved by PHWB.

D. Service Guidelines

1. **CareerSource Pasco Hernando Locations.** The Contractor shall deliver the services described in this statement of work at the locations determined by PHWB. The current centers are located at:

BROOKSVILLE

16336 Cortez Blvd.
Spring Hill, Florida
(352) 200-3020

WEST PASCO

4440 Grand Blvd.
New Port Richey, Florida
(727) 484-3400

EAST PASCO

15000 Citrus Country Way
Dade City, Florida
(813) 377-1300

Levels of service needed in each location are dependent, to a certain extent, upon the traffic within each office. Therefore, proposers need to account for the flexibility to assign staff and other resources as needed to accommodate customer flow.

2. Hours of Operation. CareerSource Pasco-Hernando's hours of operation may vary based on customer needs, but at a minimum, the centers will be open from 8:00am – 5:00pm, Monday through Friday. The Contractor must ensure that arrangements are made to keep service delivery available throughout the holiday seasons with limited closings for major holidays.
3. Drug-Free and Smoke-Free Workplace. A drug-free and smoke-free workplace for both employees and customers must be maintained.
4. Non-Discrimination. No individual shall be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with this program on the basis of race, sex, national origin, religion, age, or disability and each customer shall have such rights as are available under any applicable Federal, State, or local law prohibiting discrimination.
5. Job Vacancies. The Contractor will list all of their organization's job vacancies with CareerSource Pasco Hernando and commit to hiring customers into those job vacancies whenever possible.
6. Customer Service Commitment. The Contractor will be expected to nurture a customer service attitude that ensures that friendly, courteous service and accurate information will be delivered by knowledgeable staff in a timely manner. The customer service approach must empower staff to recognize the individuality of our customers and to deliver individual solutions and services. The Contractor will maintain a high standard of appearance in the CareerSource Pasco Hernando centers, commensurate with a business setting, and ensure professional staff conduct and presentation.
7. Corporate Identity. The Contractor will represent the CareerSource Pasco Hernando centers regionally and statewide under the CareerSource Pasco Hernando brand name, rather than the Contractor's corporate name. CareerSource Pasco Hernando will be the only brand name put forth in correspondence, forms, flyers, business cards, news stories, and phone communications.

8. Management and Financial Requirements

- a) Capabilities. Contractor must demonstrate the management and financial capability needed to effectively and efficiently deliver the program proposed. Management capability includes the ability to manage the delivery system effectively and efficiently, conduct self-monitoring for contract compliance, implement a continuous improvement model, achieve the contract objectives, provide quality service delivery, keep appropriate records in an auditable manner, and meet/exceed performance standards. The Contractor is responsible for all data entry into the various management information systems, including OSST, Employ Florida and the FLORIDA System.

Financial capability includes the ability to maintain fiscal controls, accounting procedures, and financial reporting in accordance with generally accepted accounting principles and requirements established by PHWB, demonstrate sound financial practices, and show evidence of continued financial stability. The proposer is advised that separate accounting records must be kept for the contract to ensure accurate and appropriate reporting of contract expenditures, and costs must be tracked in sufficient detail to determine compliance with contract requirements and ensure funds have not been unlawfully spent. All accounting records must be made available for review upon request for examination, audit, or for the making of excerpts or copies of such records for the purpose of determining compliance with all applicable rules and regulations, and the provisions of the contracts.

- b) Profit/Program Income. Profit may be earned by commercial (for profit) organizations. A reasonable profit objective is defined by PHWB as no more than 10%.

Any revenues above costs generated by any not-for-profit agency through use of these funds, including interest income or other program-generated income, must be reported and returned to the PHWB to be utilized to support the system. The PHWB may agree to allow these revenues to be returned to the contractor to extend the contract or provide additional services.

- c) Direct program costs. Proposers are advised that PHWB requires, and will negotiate a contract to ensure, that the total budget consists of direct program costs. Direct program costs are defined by PHWB to include, but are not limited to:

Contractors who fail to adequately track obligations and expenditures against these budgeted funds are liable for any over-expenditure resulting from such failure.

Invoices will be due to PHWB on a monthly basis by close of business on the 5th working day of the month. Invoices shall be submitted in the format provided by the PHWB Finance Department. Invoices that are submitted later than 30 working days after the end of each month may be subject to a 10% reduction penalty.

E. Quality Assurance & Continuous Improvement

The Contractor shall develop a quality control unit comprised of representatives of all partners that will identify technical assistance needs and provide quality assurance on all levels of the system. The Contractor's quality control process shall include mechanisms to detect and reduce fraud and errors in data collection, eligibility determinations and service delivery. All Contractor staff shall be responsible for error and fraud detection and reduction.

The Contractor shall establish and maintain reliable mechanisms that will immediately identify when a problem – administrative or programmatic – occurs, and when corrective action is necessary. This continuous improvement process shall include, but not be limited to, the following:

- *Automation* – The Contractor shall use automation whenever and wherever possible to deliver services. The Contractor will use all features of the FLORIDA, OSST, Atlas and Employ Florida information systems, and ensure ongoing training in the use of these systems to provide integrated service delivery. The Contractor will work with DEO, CareerSource Florida and PHWB to ensure connectivity and staff training, and will assess the need for additional tracking and management that may require an ancillary system or new functionality. The Contractor shall also explore other uses of technology to continue to improve service delivery.
- *Use of Forms* – The Contractor will ensure the effective use of forms and documents initially, by using existing documents, then by initiating a review process to streamline the use of forms and reduce redundancy of data in form and document creation. Forms should always be easy to understand, professionally written and presented, and not overwhelming in terms of the frequency or number.
- *Monitoring Activities* - The Contractor's internal monitoring activities shall include customer file review, data entry review, caseload contacts, and quality control monitoring to ensure continuous improvement and shall be provided to the Director of Operations on a monthly basis.
- *Tracking Effectiveness* – The Contractor will track effectiveness using monitoring data, State reporting data, customer feedback (client and employer focus groups and survey results), and feedback from the general public. The Contractor shall also conduct at least a monthly review and analysis of the data to identify trends, issues, etc.
- *Performance Evaluation* – The Contractor shall continuously evaluate its performance and the overall success of the service delivery system. This shall include a comprehensive analysis of both financial and performance aspects of the Contractor's operation. The evaluation shall address such aspects as accountability, supervisory review, monitoring customer progress, customer/ employer feedback, cost accounting, monitoring contract compliance, reaching performance objectives, continuous improvement, and immediate corrective action.
- *Supervisory Case Review* – The Contractor shall perform supervisory case review to ensure compliance with procedural and policy requirements and to ensure the effective provision of services to accomplish the contract goals and objectives. The Contractor should document deficiencies, take corrective action (to include both system-wide and individualized training), and follow-up to ensure that all issues of non-compliance are addressed and corrected. All internal monitoring reports and corrections are to be provided to the Director of Operations on a monthly basis.

F. Performance Measures & Reporting Requirements

1. Performance Measures.

At a minimum, the Contractor will be expected to achieve the PHWB's state-negotiated performance levels. Listed in Appendix 4 are some of the current performance measures and past negotiated performance goals. Current performance goals will be discussed.

2. Reporting Requirements.

The Contractor will maintain documentation necessary to generate information for required federal, state and PHWB reports, and provide financial and other information on daily operations as requested. The Contractor will carefully analyze existing reports to determine whether reports or report elements are necessary and whether the reports meet the needs of PHWB, Federal and State agencies or the Contractor's own business requirements.

The Contractor shall ensure coordination with the PHWB for further development of management reporting. The Contractor shall also develop systems (either electronic or manual) to provide user-friendly ad-hoc reporting capability. The Contractor shall ensure that the combination of the various systems and the Contractor's processes produce all information needed to manage the daily operations of the system, including performance measures, unduplicated client and transaction counts, training enrollments by location and vendor, and recidivism rates across integrated enrollment programs.

The following reports are required:

Fiscal

Monthly: All invoices will be submitted not later than close of business on the 5th working day of the following month.

Close of

Contract: The final invoice will be submitted no later than 31 days after the close of the contract.

Note: The Contractor must maintain a fiscal management system that provides an accurate reporting of contract and supportive service expenditures and obligations and deliver reports within two business days of requests by PHWB. In addition, the Contractor must maintain all physical documentation supporting payment requests.

Program Activity

Monthly: Customer flow counts by program.

Monthly: WIOA customer activities and Placements.

PART 3: PROPOSAL SUBMISSION REQUIREMENTS

A. Eligible Entities

All public or private not-for-profit corporations, local education agencies, governmental units, public agencies, or private-for-profit corporations properly organized in accordance with State and Federal law and in business for at least one (1) year may submit a proposal for funding. Minority and women-owned and operated businesses are encouraged to submit a proposal.

No entity may compete for funds if: (1) the entity has been debarred or suspended or otherwise determined to be ineligible to receive federal funds by an action of any governmental agency; (2) the entity's previous contract(s) with the PHWB have been terminated for cause; (3) the entity has not complied with an official order to repay disallowed costs incurred during its conduct of programs or services; or (4) the entity's name appears on the convicted vendor list.

B. Letter of Intent

A letter of intent to bid is mandatory and must clearly identify the proposer and the activities or services that proposer will deliver. The letter of intent does not commit a proposer to submitting a proposal. The letter of intent to bid must be received no later than January 10, 2023.

The letter of intent may be emailed to:

Brenda Gause

bgause@careersourcepascohernando.com

The prospective proposer is solely responsible for assuring that anything sent to the PHWB arrives safely and on time.

C. Proposal Format

All proposals must be submitted with the same topic headings, and in the same order, as in the Proposal Outline set forth below. The proposal document format must be single-spaced, with 12-point type, and margins of one inch on each side. Each page of the proposal should be numbered sequentially at the bottom of the page. These page numbers should be reflected in the proposal's table of contents.

Each proposal should be prepared simply and economically, providing a straightforward response to this RFP. Elaborate or expensive bindings, colored displays, and promotional materials are not desired.

D. Proposal Content & Organization

1. Cover Page – use form provided [1 page]

2. Proposal Abstract – use form provided [1-2 pages]

- Describe the intentions and purpose of your organization, and provide your organization's mission statement.
- Describe your philosophy for management and service delivery.
- Describe whom you see as your customer(s) in the CareerSource Pasco Hernando System, and define your view of quality service to those customers.
- Discuss your management structure, and describe your strategies for motivating staff from different organizations to provide excellent customer service while achieving measurable performance outcomes.
- Describe any special strengths or features that distinguish your services from other organizations – i.e., the value that will be added to the CareerSource Pasco Hernando System through your organization.

3. Table of Contents

4. Proposal Narrative *[Note: Using the outline numbering format provided below, ensure that the requirements listed in the Scope of Work are addressed in detail. Clear, thorough, concise answers are requested. Do not repeat statements or ideas within the text of the proposal. Referring the reviewer to another section of the proposal for previously stated information is preferred over repeating the information. **Clarity is the key.***

A. Organizational Experience / Capabilities [maximum eight pages]

Describe the proposing agency's mission and philosophy for management and service delivery, and organizational experience in providing the services proposed, as well as the organization's capabilities to deliver the proposed services by thoroughly responding to the directions below.

(1) Describe your organization's specific experience, to include:

- The intentions and purpose of your organization, and provide your organization's mission statement.
- Your philosophy for management and service delivery.
- Whom you see as your customer(s) in the CareerSource Pasco Hernando System, and define your view of quality service to those customers.
- Any special strengths or features that distinguish your services from other organizations – i.e., the value that will be added to the CareerSource Pasco Hernando System through your organization.

(2) Describe your organization's specific experience in managing and delivering Workforce Training (i.e. Occupational Skills Training) mentioned in this RFP's Scope of Work. Include in the description the organization's experience and capabilities in:

- Managing and delivering these services in Florida;

- Managing an integrated multi-funded / multi-program system;
 - Providing business and job-seeker services, including any innovative methods used in the delivery of these services;
- (3) Provide in table format your organization's experience and capabilities in achieving measurable performance outcomes by identifying goals set (either through a contract, plan, or policy) and providing verifiable performance achievement data against those set goals (training completion rate, job placement rate, average wage at placement, six-month job retention rate, cost per placement, participation rate, job seeker and employer satisfaction rate, etc.). Provide this information for each of the programs mentioned above for each contract held in Florida and in other states during the last 18 months. Provide a contact person, phone number and email address for each such contract.
- (4) Describe your organization's financial and administrative experience and capabilities. Include in that description experience in:
- Managing and accounting for multiple federal, state and local funding sources in accordance with GAAP;
 - Maintaining timely and accurate data in the various MIS systems;
 - Conducting self-monitoring for contract performance and compliance;
 - Developing and implementing a continuous improvement model.
- (5) Identify key staff that will be assigned to work on this project, including the lead for the local operation, describe why these key staff would be successful on this project, and provide copies of their résumés. In addition, describe what further assistance and expertise will be made available by the proposing organization to support these key staff.

B. Service Strategy

Through addressing the items below, outline your organization's understanding of the current needs of the local workforce and detail how you plan to deliver the services requested while meeting the service guidelines provided.

- (1) Describe your organization's understanding of the Pasco and Hernando County communities, and the local labor market.
- (2) Describe your complete staffing plan, to include:
- Management structure and qualifications of lead staff;
 - Brief job descriptions of all staff positions;
 - Table of Organization, to include number of positions by location and service delivery function;
- (3) Describe your plan to provide all of the services listed in the Scope of Work.

(4) Describe your plan to establish and maintain a continuous improvement process that includes data collection, reporting, data analysis, and corrective action mechanisms to ensure that performance goals are achieved.

(5) Include any creative and innovative methods in the delivery of the proposed services.

5. Budget

A detailed line-item budget must be submitted. Costs included in the proposed budget must be actual costs incurred in delivering the proposed services.

- A. Provide a **detailed budget narrative** that justifies each proposed expense in terms of it being necessary, allowable and reasonable. Please provide specific details for the method of computation.
- B. Give details of the organization's cost allocation method if one is used, e.g., prorating the cost of supplies based on the number of staff, or the cost of salaries based on percentage of time spent on this contract. Please be specific.
- C. Identify any in-kind resources/support for the service delivery system beyond that requested for reimbursement in the budget. Include each committed or proposed source of funding and the amount of that funding.
- D. State what contingency plans are in place to repay the PHWB in the event that there are any disallowed costs as a result of an audit or monitoring review.
- E. Describe how the proposing agency will financially support the costs of doing business until an invoice can be submitted and paid by PHWB. *Note: No advance payment will be made.*
- F. State what method of payment will be requested, either fixed-unit price or cost-reimbursement with a demonstrated performance basis.

If a fixed-unit price contract is proposed, describe in detail the proposed outcome-based payment points and the documentation that will be submitted to prove attainment of each outcome. If a cost-reimbursement with a demonstrated performance holdback contract is proposed, provide the proposed percentage of the total cost that will be withheld (**minimum is 10%**) until measurable performance outcomes are achieved and documented. Describe the measurable performance outcomes to which the proposer will tie payment and the documentation that will be submitted to prove attainment of each outcome.

- G. If funded, what percentage of the proposing agency's total budget will this contract represent?

List the proposed profit, if applicable. Profit may be earned by commercial (for-profit) organizations, depending on the risk involved and provided that profit is reasonable and not excessive. A reasonable profit objective is defined by PHWB as a gross profit objective of no more than 10%.

- H. Describe how the proposer will budget and maximize the total cost of the contract on direct program costs. Describe any indirect costs that are proposed. If an indirect cost rate is utilized, please provide a copy of the indirect cost rate approval letter and the approved rate.

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 costs 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 the proposed costs. 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; to ensure that the costs are directly associated with carrying out only the proposed services; and to ensure that the proposed costs will benefit the CareerSource Pasco Hernando system.

6. Value Added Services [maximum two pages] – Answer the question: What does your organization bring to the area as a value-added service?

E. Proposal Submission

Proposals must be received by the PHWB no later than **January 27, 2023 at 3:30pm (EST)**. Proposals must be delivered to bgause@careersourcepascohernando.com

Until the proposal submission deadline, errors in proposals may be corrected by a request in writing to withdraw the proposal and by submission of another set of proposals with the mistakes corrected. Corrections will not be accepted once the deadline for submission of proposals has passed.

It is the sole responsibility of the submitting proposer to ensure that its proposal is received before the submission deadline. Submitting proposers shall bear all risks associated with delays in delivery by any person or entity, including the U.S. Mail. Any proposals received after the scheduled closing time for receipt of proposals will be returned to the sender unopened. Timely hand delivered proposals are acceptable. No facsimile (fax) or electronic mail (e-mail) copies will be accepted.

The PHWB will not return proposals, binders or exhibits to proposals. All proposals become the property of the PHWB and will be a matter of public record subject to the provisions of Chapter 119, Florida Statutes. The PHWB shall have the right to use all ideas, or adaptations of those ideas, contained in any proposal received in response to this RFP without the necessity of paying a fee, license, or royalty. Selection or rejection of the proposal will not affect this right.

PART 4: SELECTION PROCESS

A. Selection Policy

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 organizational, accounting and operational controls; and
- The technical skills to perform the work.

All prospective proposers 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.

B. Proposal Responsiveness

To be considered responsive, proposals must meet the following minimum criteria:

1. Send responses to bgause@careersourcepascohernando.com **no later than 3:30pm, January 27, 2023**. The timely delivery of a proposal is entirely the responsibility of the proposer. Proposals received after the due date or time will be considered non-responsive. Proposals hand delivered after the due date or time will be considered non-responsive.
2. Proposals must be presented in the same order as set forth in "Proposal Format" below and contain all information requested.
3. Giving incomplete or erroneous information or withholding important information could result in disqualification or, later, contract termination.
4. Proposers must demonstrate a general understanding of the service delivery system; the services solicited by this RFP and the ability to effectively and efficiently manage and deliver those requested services.

C. Proposal Review & Evaluation

Proposals will be initially reviewed and rated by a PHWB Ad Hoc Committee using a point system based on a Proposal Evaluation/Rating Form. The Ad Hoc Committee will make recommendations to the PHWB Executive or full Board. The Board will approve a proposal for award contingent upon successful contract negotiation.

D. Contract Award

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 Board 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.

E. Appeal Procedure

In accordance with applicable regulations, proposers who are denied funding have the right to appeal. The following steps must be taken for organizations to appeal funding decisions.

1. Submit a letter within three business days from the date of the contract award to the President/CEO of the Pasco-Hernando Workforce Board, Inc., stating that an appeal to the contract award is being filed and the specific reasons for that appeal. The reasons relied upon must be based on the four criteria listed below:
 - Clear and substantial error or misstated facts by the review team upon which the decision was made by the Board
 - Unfair competition or conflict of interest in decision making process
 - Any illegal or improper act or violation of law
 - Other legal basis on grounds that may substantially alter the Board's decision

The President/CEO (contact info below) will review the appeal and respond within 10 business days.

Jerome Salatino, President/Chief Executive Officer
Pasco-Hernando Workforce Board, Inc.
P.O. Box 6589
Spring Hill, FL 34611

2. In the event the President/CEO's response is not satisfactory to the proposer, an appeal to the PHWB Executive Committee may be requested. The request must be addressed in writing within 15 days from receipt of response from President/CEO to:

Chair, Executive Committee
Pasco-Hernando Workforce Board, Inc.
P.O. Box 6589
Spring Hill, FL 34611

The appeal will be scheduled to be heard at a time set by the Chair after consultation with counsel.

APPENDIX 1

Required Forms, Documentation & Certifications

PASCO-HERNANDO WORKFORCE BOARD, INC.
Proposal Cover sheet

Submitted in response to 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 RFP # 01-01042023 WIOA AD/DW_WT, 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

PASCO-HERNANDO WORKFORCE BOARD, INC.
Proposal Abstract – RFP # 01-01042023 WIOA AD/DW_WT

Name of proposing agency: _____

Total proposed cost: \$ _____

Proposal is for (check one):
_____ Performance-based, fixed-unit cost contract.
_____ Cost-reimbursement contract with demonstrated
performance holdback.
_____ Percentage amount of performance holdback:

Description: Provide a brief but thorough summary of the experience, capabilities and plans of the proposing organization, including the requirements listed in Part 3, Section D2:

<p align="center">PASCO-HERNANDO WORKFORCE BOARD, INC.</p> <p align="center">Budget Forms – RFP # 01-01042023 WIOA AD/DW_WT</p>	
---	--

[illegible]

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 its proposed program;
 - f. it will comply with the assurances attached to this RFP, and the WIOA 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.

Organization

Name of Certifying Official

Signature

Date

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.

- | | |
|--|---|
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 1. All positions with the proposing agency have up-to-date job descriptions. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 2. All employees meet the minimum qualifications specified in their job descriptions. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 3. All W-2's and I-9's with appropriate documentation are on file. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 4. Withholding and FICA deposits have been made in full on a timely basis. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 5. Insurance and bonding policies are current and all appropriate staff are covered. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 6. The facilities of this agency and any training location are accessible to the disabled. Attach a completed ADA facility checklist. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 7. The books of account are auditable. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 8. Administrative and internal accounting controls are adequate to safeguard program assets. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 9. The accounting system adequately accounts for program funds. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 10. Financial reports fairly present accrued program expenditures by established cost categories. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 11. Budgetary procedures are adequate to control expenditures. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 12. The agency has a written accounting procedures manual that includes procedures for: |
| | a) coding of expenditures by: |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | (1) contract year or program year |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | (2) funding source |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | (3) cost category; |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | b) bank reconciliations |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | c) posting to books |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | d) monthly close-out |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | e) trial balancing |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | f) development of accruals |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | g) segregation of duties |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | h) cost allocation |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | i) budgetary control |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | j) cash management |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | k) cash receipt and disbursement |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | l) payroll |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | m) reconciliation of any petty cash fund |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 13. The procedures in the accounting manual are being followed. |
| | 14. Internal controls |
| | a) for cash receipts: |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | (1) cash is properly controlled and promptly deposited when received |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | (2) funds are deposited in a bank in interest bearing checking accounts and secured by FDIC or other security |
| | b) checks are: |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | (1) pre-numbered |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | (2) adequately safeguarded |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | (3) properly mutilated when voided |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | (4) not allowed to be written for cash |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | (5) not allowed to be signed in advance; |

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

Contract No: **RFP #**

SECTION I

Signature _____ Company Name _____

Name of Official (Type or Print) Business Address

City, State, Zip Code

I hereby certify that the following named Grantee official(s) and employee(s) having material financial interest(s) [in excess of 5%] in this company have filed the appropriate Conflict of Interest statements with the Grantee prior to the beginning date of this Contract.

Name	Title or Position	Date of Filing

Signature _____ Company Name _____

Name of Certifying Official	Business Address
-----------------------------	------------------

City, State, Zip Code

FEDERAL AND FLORIDA COMPLIANCE ASSURANCES AND CERTIFICATIONS

(Company Name) (hereinafter referred to as “Contractor”) acknowledges and certifies that, to the extent applicable to this contract/agreement (based on (insert information) funding source, program activities, and statutory requirements) Contractor shall comply with the following if applicable:

APPENDIX II TO PART 200—CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS

- A. **TERMINATION PROVISIONS (CONTRACTS OF \$150,000).** Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate. The parties agree that in the event Contractor shall fail to comply with any term, provision, or condition of this Agreement, then in the absence of a remedy provision contained elsewhere in the Master Agreement, Pasco-Hernando Workforce Board, Inc. may at its sole election terminate this Agreement without being liable to prosecution or may bring a claim for specific performance or may bring an action to recover damages caused by such breach. Additionally, Pasco-Hernando Workforce Board, Inc. (PHWB) may consult with an attorney concerning PHWB’s rights hereunder, and Contractor agrees in each and any such case to pay to PHWB its reasonable attorney’s fees therefore.
- B. **TERMINATION PROVISIONS (CONTRACTS OF \$10,000).** All contracts in excess of \$10,000 must address termination for cause and for convenience by the non-Federal entity including the manner by which it will be affected and the basis for settlement. The parties agree that in the event there is no provision contained elsewhere in the Master Agreement to the contrary, then the Parties agree that this Agreement may be terminated by either party with, or without, cause upon thirty (30) day’s prior written notice. Further, PHWB is a quasi-governmental entity reliant in part on funding received from governmental grants. Accordingly, notwithstanding anything else contained herein to the contrary, PHWB shall have the right to terminate the Agreement or any of the agreements comprising the Master Agreement by reason of funding unavailability at any time by providing thirty (30) days advance written notice. If this agreement is terminated, all payments defined therein shall cease to be due as of the date of termination.
- C. **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of “federally assisted construction contract” in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 CFR part 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”
- D. **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. 3141-3148).** When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3,

“Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or sub-recipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

- E. **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. 3701-3708).** Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.
- F. **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the Federal award meets the definition of “funding agreement” under 37 CFR §401.2 (a) and the recipient or sub-recipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or sub-recipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.
- G. **CLEAN AIR ACT (42 U.S.C. 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. 1251-1387), AS AMENDED.** Contracts and sub-grants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).
- H. **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 CFR 180.220) must not be made to parties listed on the government-wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.
- I. **BYRD ANTI-LOBBYING AMENDMENT (31 U.S.C. 1352).** Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

- J. **SOLID WASTE DISPOSAL ACT, AS AMENDED BY THE RESOURCE CONSERVATION AND RECOVERY ACT (42 USC 6962; 2 CFR §200.322).** A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.
- K. **TRAFFICKING VICTIMS PROTECTION ACT OF 2000 (2 CFR 175.15(B)).** During the term of the Agreement, Contractor, and its employees, may not engage in severe forms of trafficking in persons, procure a commercial sex act, or use forced labor in the performance of the Agreement.
- L. **VETERAN'S PRIORITY OF SERVICE PROVISIONS (38 USC 4215; 20 CFR 1010).** A covered person is entitled to priority of service under any qualified job training program if the person otherwise meets the eligibility requirements for participation in such program. An entity of a State, a political subdivision of the State, or in this case, a Contractor, that administers or delivers services under a qualified job training program shall provide information and priority of service to covered persons regarding benefits and services that may be obtained through other entities or service providers; and ensure that each covered person who applies to or who is assisted by such a program is informed of the employment-related rights and benefits to which the person is entitled under this section.
- M. **EQUAL TREATMENT FOR FAITH BASED ORGANIZATIONS (29 CFR 2, Subpart D).** Any organization that participates in a program funded by federal financial assistance shall not, in providing services or in outreach activities related to such services, discriminate against a current or prospective program beneficiary on the basis of religion, religious belief, a refusal to hold a religious belief, or a refusal to attend or participate in a religious practice. However, an organization that participates in a program funded by indirect financial assistance need not modify its program activities to accommodate a beneficiary who chooses to expend the indirect aid on the organization's program.
- N. **PURCHASE OF AMERICAN MADE PRODUCTS (P.L. 103-333 §507).** It is the sense of the Congress that, to the greatest extent practicable, all equipment and products purchased with funds made available under Public Law 103-333 should be American-made. Funds made available under this Public Law may be used to fund Contractor's performance under this Agreement. In providing financial assistance to, or entering into any contract with, any entity using funds made available in this Act, Contractor, to the greatest extent practicable, shall provide to such notice describing the statement made by the Congress, as to American made products.
- O. **PUBLIC ANNOUNCEMENTS AND ADVERTISING (P.L. 103-333 §508).** When issuing statements, press releases, requests for proposals, bid solicitations and other documents describing projects or programs funded in whole or in part with Federal money, all Contractors receiving Federal funds, including but not limited to State and local governments and recipients of Federal research grants, shall clearly state (1) the percentage of the total costs of the program or project which will be financed with Federal money, (2) the dollar amount of Federal funds for the project or program, and (3) percentage and dollar amount of the total costs of the project or program that will be financed by nongovernmental sources.
- P. **CODES OF CONDUCT (29 CFR 95.42).** The Contractor shall maintain written standards of conduct governing the performance of its employees engaged in the award and administration of contracts. No employee, officer, or agent shall participate in the selection, award, or administration of a contract supported by Federal funds if a real or apparent conflict of interest would be involved. Such a conflict would arise when the employee, officer, or

agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in the firm selected for an award. The officers, employees, and agents of the Contractor shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors, or parties to sub-agreements. However, Contractor may set standards for situations in which the financial interest is not substantial or the gift is an unsolicited item of nominal value. The standards of conduct shall provide for disciplinary actions to be applied for violations of such standards by officers, employees, or agents of the Contractor.

Q. **EMPLOYMENT ELIGIBILITY REQUIREMENTS.** Employment of unauthorized aliens by Contractor is considered a violation of the Immigration and Nationality Act. Contractor shall use the U.S. Department of Homeland Security's E-verify system to verify the employment eligibility of all new employees hired by Contractor during the contract term. Contractor shall be responsible for including the provisions of this paragraph in any context with, and requiring compliance by any/all subcontractors performing under this Agreement. If Contractor knowingly employs unauthorized aliens, in violation of this paragraph, such action shall be cause for unilateral cancellation of this Agreement and PHWB may recover damages from Contractor resulting from such cancellation. Further, PHWB may unilaterally terminate this Agreement, without penalty, if Contractor is determined to have violated a prohibition in this paragraph of this Agreement; or has an employee who is determined by PHWB to have violated a prohibition in this paragraph of this Agreement through conduct that is either associated with performance of this Agreement or imputed to Contractor using the standards and due process for imputing the conduct of an individual to an organization that are provided in 2 CFR part 180, "OMB Guidelines to Agencies on Government-wide Debarment and Suspension (Non-procurement)," as implemented by PHWB.

R. **ASSURANCES AND CERTIFICATIONS.** The Department of Economic Opportunity (DEO) will not award federal workforce funds where the PHWB or its contractors have failed to complete the ASSURANCES AND CERTIFICATIONS contained in this Appendix. In performing its responsibilities under the Master Agreement, the Contractor provides the following certifications and assurances:

1. Assurances – Non-Construction Programs (SF 424 B)
2. Debarment and Suspension Certification (29 CFR Part 98 and 45 CFR Part 74)
3. Certification Regarding Lobbying (29 CFR Part 93 and 45 CFR Part 93)
4. Drug free Workplace Certification (29 CFR Part 98 and 45 CFR Part 82)
5. Nondiscrimination & Equal Opportunity Assurance (29 CFR Part 37 and 45 CFR Part 80)
6. Certification Regarding Environmental Tobacco-Smoke
7. Association of Community Organizations for Reform Now (ACORN) Funding Restriction Assurance (Pub. L 111-117)
8. Scrutinized Companies Lists Certification (Section 287.135.F.S.)

NOTE: Certain of these Assurances may not be applicable to your project or program. If you have questions, please contact PHWB.

S. **ASSURANCES – NON-CONSTRUCTION PROGRAMS.** As the duly authorized representative of the Contractor, I certify that Contractor:

1. Will give the Department, the Comptroller General of the United States, and if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or

documents related to the award, and will establish a proper accounting system in accordance with generally accepted accounting standards or Department directives.

2. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color, or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. 1681-1683, and 1685-1686), which prohibits discrimination on the basis of handicaps; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. 6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255) as amended, relating to nondiscrimination the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L., 91-616) as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) Sections 523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. 290 dd.3 and 290 cc-3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights act of 1968 (42 U.S.C. 3601 et seq.) as emended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and (j) the requirements of any other non-discrimination statute(s) which may apply to the Agreement.
3. Will comply with the provisions of the Hatch Act (5 U.S.C. 1501-1508 and 7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.
4. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. 276a to 276a7), the Copeland Act (40 U.S.C. 276c and 18 U.S.C. 874), and the Contract Work Hours and Safety Standards Act (40.327-333), regarding labor standards for federally assisted construction sub-agreements.
5. Will comply with environment standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. 1451 et. seq.); (f) conformity of Federal actions to State (Clear Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et. seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205).
6. Will cause to be performed the required financial and compliance audits in accordance with the single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
7. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations and policies governing the programs associated with the Agreement.
8. Will comply with the procurement standards of 2 CFR 200.318 –200.326.

T. **CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS – PRIMARY COVERED TRANSACTION.** The Contractor certifies to the best of its knowledge and belief, that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by a State or a Federal department or agency;
2. Have not within a three-year period preceding the Agreement been convicted 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 antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (B)(2) of this certification; and/or
4. Have not within a three-year period preceding the Agreement had one or more public transactions (Federal, State, or local) terminated for cause or default.
5. Have not been placed on the convicted vendor list following a conviction of a public entity crime as set forth in Fla. Stat. 287.133(2)(a).
6. Have not been placed on the discriminatory vendor list described in Section 287.134 Fla. Stat.

U. CERTIFICATION REGARDING LOBBYING – CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS. The Contractor certifies, to the best of its 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 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, an officer or employees of Congress, or employee of a Member of Congress in connection with this Federal 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 that language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants and contracts under grants, loans and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly;
4. 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 31 U.S.C. 1352. 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;
5. Contractor shall not, directly or indirectly, expend either state or federal funds either (i) for the purpose of lobbying any branch, unit or instrumentality of the state or federal governments, or (ii) for any otherwise allowable purpose which could result in unauthorized lobbying.

V. CERTIFICATION REGARDING DRUG-FREE WORKPLACE REQUIREMENTS. Pursuant to the Drug-Free Workplace Act of 1988 and its implementing regulations codified at 29 C.F.R. Part 94, the undersigned Contractor, attests and certifies that it will provide a drug-free workplace by the following actions.

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the RWBs' workplace and specifying the actions that will be taken against employees for violation of such prohibition.
2. Establishing an ongoing drug-free awareness program to inform employees concerning:
 - a. The dangers of drug abuse in the workplace;
 - b. The policy of maintaining a drug-free workplace;
 - c. Any available drug counseling, rehabilitation and employee assistance programs;
 - d. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
3. Making it a requirement that each employee to be engaged in the performance of the agreement be given a copy of the statement required by paragraph V.1. of this certification.
4. Notifying the employee in the statement required by paragraph V.1. of this certification that, as a condition of employment under the contract, the employee will:
 - a. Abide by the terms of the statement;
 - b. Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring the workplace no later than five (5) calendar days after such conviction.
5. Notifying the PHWB in writing ten (10) calendar days after receiving notice under subparagraph 4.b. of this Section from an employee or otherwise receiving actual notice of such conviction. Provide such notice of convicted employees, including position title, to every Grant Officer on which Grant activity the convicted employee was working. The notice shall include the identification number(s) of each affected contract/Grant. An Incident Report Form, which can be found on the Department's intranet site, should be completed and submitted to the following address:

Office of the Inspector General
 Department of Economic Opportunity
 MSC# 130, Caldwell Building
 107 East Madison Street
 Tallahassee, Florida 32399-4126

6. Taking one of the following actions, within thirty (30) calendar days of receiving notice under subparagraph 4.b., with respect to any employee who is so convicted.
 - a. Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973 as amended.
 - b. Requiring such employee to participate satisfactorily in drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State or local, health, law enforcement, or other appropriate agency.
7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of this entire certification.

W. ***NONDISCRIMINATION & EQUAL OPPORTUNITY ASSURANCE.*** As a condition of the Contract the Contractor assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

1. Section 188 of the Workforce Investment Act of 1998 (WIA) which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title IB financially assisted program or activity;
2. Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin;
3. Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities;
4. The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age;
5. Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in education programs; and
6. The American with Disabilities Act of 1990 (Pub. L. 101-336), prohibits discrimination in all employment practices, including, job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities.

The Contractor also assures that it will comply with 29 CFR Part 37 and all other regulations implementing the laws listed above. This assurance applies to the Contractor's operation of the WIA Title I – financially assisted program or activity, and to all agreements the Contractor makes to carry out the WIA Title I – financially assisted program or activity. The Contractor understands that PHWB, DEO and the United States have the right to seek judicial enforcement of the assurance.

- X. ***CERTIFICATION REGARDING ENVIRONMENTAL TOBACCO-SMOKE.*** As a condition of the contract, the Contractor assures that it will comply fully with the certification regarding environmental tobacco-smoke.

The Pro-Children Act of 2001, 42 U.S.C. 7181 through 7184, imposes restrictions on smoking in facilities where Federally-funded children's services are provided. Grants are subject to these requirements only if they meet the Act's specified coverage. The Act specifies that smoking is prohibited in any indoor facility (owned, leased, or contracted for) used for the routine or regular provision of kindergarten, elementary, or secondary education or library services to children under the age of 18. In addition, smoking is prohibited in any indoor facility or portion of a facility (owned, leased, or contracted for) used for the routine or regular provision of federally funded health care, day care, or early childhood development, including Head Start services to children under the age of 18. The statutory prohibition also applies if such facilities are contracted, operated or maintained with Federal funds. The statute does not apply to children's service provided in private residences, facilities funded solely by Medicare or Medicaid funds, portions of facilities used for inpatient drug or alcohol treatment, or facilities where WIC coupons are redeemed. Failure to comply with the provision of the law may result in the imposition of a civil monetary penalty of up to \$1,000 per violation and/or the imposition of an administrative compliance order on the responsible entity.

- Y. ***ASSOCIATION OF COMMUNITY ORGANIZATIONS FOR REFORM NOW (ACORN) FUNDING RESTRICTIONS ASSURANCE (Pub. L. 111-117).*** As a condition of the Agreement, the Board assures that it will comply fully with the federal funding restrictions pertaining to ACORN and its subsidiaries per the Consolidated Appropriations Act, 2010, Division E, Section 511 (Pub. L. 111-117). The Continuing Appropriations Act, 2011, Sections 101 and 103 (Pub. L. 111-242), provides that appropriations made under Pub. L. 111-117 are available under the conditions provided by Pub. L. 111-117. Note: As of June 20, 2011, this matter is in litigation in the District Court for the Eastern District of New York.

Z. **SCRUTINIZED COMPANIES LISTS CERTIFICATION, SECTION 287.135, F.S.** If a board that is affiliated with the local governmental entity enters into a contract in the amount of \$1 million or more, in accordance with the requirements of section 287.135, F.S., the Contractor will submit a certification that the contractor is not listed on the Scrutinized Companies that Boycott Israel list, or is engaged in a boycott of Israel, the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, engaged in business operations in Cuba or Syria, or meets the conditions for exemption as provided in section 287.135(4), F.S. Both lists are created pursuant to section 215.473, F.S.

AA. **PUBLIC RECORDS LAW; SUNSHINE LAW.** Contractor agrees to comply with public records and open meeting requirements as applicable including 2 CFR 200.333, and 2 CFR 200.336, and as may be required by Florida Public Records Law, and Florida Sunshine Law. In furtherance of this provision, Contractor is required to:

1. keep and maintain public records required by PHWB to perform the service;
2. upon request from PHWB's custodian of public records, provide PHWB with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a reasonable or as otherwise provided by law;
3. ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if Contractor does not transfer the records to PHWB;
4. upon completion of the Agreement, transfer, at no cost, to PHWB all public records in possession of Contractor or keep and maintain public records required by PHWB to perform the service. If Contractor transfers all public records to PHWB upon completion of the Agreement, Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If Contractor keeps and maintains public records upon completion of the Agreement, Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to PHWB, upon request from PHWB's custodian of public records, in a format that is compatible with the information technology systems of PHWB.

IF CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT: PUBLIC RECORDS CUSTODIAN, PASCO HERNANDO WORKFORCE BOARD, INC. (PO BOX 6589, SPRING HILL, FL 34611; PUBLICRECORDSCUSTODIAN@CAREERSOURCEPASCOHERNANDO.COM; 352-593-2220).

BB. **INDIVIDUAL NON-DISCLOSURE AND CONFIDENTIALITY CERTIFICATION.** To the extent any Contractor, or employee of Contractor, is granted authorization to access workforce information systems, including systems containing confidential information, Contractor and its employees are required to complete the established Individual Non-Disclosure and Confidentiality Certification Form upon request.

CC. **MANDATE TO REPORT ABUSE OF VULNERABLE POPULATIONS.** In compliance with Sections 39.021 and 415.1034 Florida Statutes, if Contractor, and its agents, employees, or others performing services on Contractor's behalf, knows or has reasonable cause to suspect that a child, aged person or disabled adult is or has been abused, neglected, or exploited, Contractor, and its agents, employees and others performing services on Contractor's behalf, agree to immediately report such knowledge or suspicion to the Florida Abuse Hotline by calling 1-800-96ABUSE or via the web reporting option at [http:// www.dcf.state.fl.us/abuse/report](http://www.dcf.state.fl.us/abuse/report) or via fax 1-800-914-0004.

By signing below, the Contractor certifies and assures that it will fully comply with the applicable assurances outlined above.

Contractor: _____
Signature

Print Name and Title

Appendix 2: References

Proposers shall provide three (3) references for services outlined in this RFP.

Reference #1

Company Name
Contact Person
Address
Phone Number
Email
Service Dates

Reference #2

Company Name
Contact Person
Address
Phone Number
Email
Service Dates

Reference #3

Company Name
Contact Person
Address
Phone Number

Email

Service Dates

As part of the reference check process, PHWB reserves the right to review the specific qualifications and relevant capabilities of all personnel; review licensing; review audits; and contact any individuals, agencies or employers listed in the proposal and/or others who may have experience or knowledge of the bidder's performance and qualifications to do the work.

APPENDIX 3

PROPOSAL EVALUATION FORMS

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: _____

Rater's

Name:

Date: _____

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	<p>Information not provided</p> <p>Addresses mission , views and value</p> <p>Mission, views and values closely related to PHWB's mission and values</p>		
<p>b) Previous specific experience in delivering WIOA and other training services mentioned in RFP</p> <p>Performance results from current or recent contracts</p>	0-20 pts.	<p>No specific experience</p> <p>Experience in 1 or 2 of the listed programs</p> <p>Experience with 3 or more programs</p> <p>Exceptional experience, 5 or more years providing similar services</p> <p>Poor or unrelated performance results</p> <p>Achieved performance standards</p>		

		Exceeded most performance standards		
References	0-15	No references Sufficient references Exceptional references provided		
Percentage of past students who have gained/retained sustainable employment	0-15			
Total Points For This Section				
Budget	Max. 35 pts.			
a) Budget narrative The budget narrative incorporates the following: <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs 	0-10	Requirements not addressed or poorly addressed Requirements addressed Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided		

<ul style="list-style-type: none"> • description of how the organization will support costs until invoices are paid • detail of the proposed method of payment 				
<p>b) Budget costs:</p> <p>Proposed costs are necessary, allowable, reasonable, and properly supported</p> <p>Proposed profit is reasonable</p>	0-15	<p>Proposed costs not adequately supported</p> <p>Adequate justification provided to support costs; proposed costs are necessary and allowable</p> <p>Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable</p>		
<p>c) Administrative and financial management experience and capabilities</p>	0-10	<p>Less than 3 years experience</p> <p>3 to 5 years of experience</p> <p>More than 5 years experience</p>		
Total Points For This Section				

RATING SUMMARY – RFP #

PROPOSER: _____

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	

COMMENTS: _____

Rater's Signature

Date



COMPUTER COACH

PASCO-HERNANDO WORKFORCE BOARD, INC.

Proposal Cover Sheet

Submitted in response to RFP # 01-01042023 WIOA AD/DW_WT

NAME OF PROPOSING AGENCY: Computer Coach Training Center

ADDRESS: 5005 N Hesperides Street, Tampa, FL 33614

TELEPHONE NUMBER: 813-947-0552

MOBILE NUMBER FOR SUZANNE RICCI: 813-299-1812

EMAIL ADDRESS: suzanne@computercoach.com

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 RFP # 01-01042023 WIOA AD/DW_WT, 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:

Suzanne Ricci, CEO



COMPUTER COACH

PASCO-HERNANDO WORKFORCE BOARD, INC.

Proposal Abstract – RFP # 01-01042023 WIOA AD/DW_WT

Name of proposing agency: __Computer Coach Training Center__

Total proposed cost: \$ __400,000.00__

Proposal is for (check one):

____Performance-based, fixed-unit cost contract.

__X__ Cost-reimbursement contract with demonstrated performance holdback.

_10%__ Percentage amount of performance holdback:

Description: Provide a brief but thorough summary of the experience, capabilities and plans of the proposing organization, including the requirements listed in Part 3, Section D2:

Please see next page for Abstract.



Table of Contents

Proposal Abstract	4
Management Philosophies	4
Service Delivery Philosophies	4
Our Customers	5
Motivational Strategies	5
Special Strength	5
Proposal Narrative	7
Organizational Experience & Capabilities	7
(1.) Computer Coach Experience & Customers	7
(2) Workforce Development Experience	7
Computer Coach's Job Placement Department	8
(3) Performance Outcomes	9
(4) Financial and Administrative Experience and Capabilities	10
Continuous Improvement Policy for Computer Coach Training Center	10
(5) Key Staff	10
B. Service Delivery	11
(1.) Pasco Hernando Experience	11
(2.) Staffing Plan	11
(3.) The Computer Coach Plan	12
Training	13
Job Placement Plan	14
(4.) Continuous Improvement	15
(5.) Innovative Delivery Methods	16
5. Budget	17
A. Detailed Budget Narrative	18
5.B – Cost Allocation:	19
5.C – In-Kind Contributions:	19
5.D - Contingency Plans:	19
5.E – Financial Support:	19
5.F - Method of Payment:	19
5.G – Budget Percentage:	19
5.H – Direct Program Costs:	20
6. Value-Added Services	20



Proposal Abstract

Our mission at Computer Coach is to offer up-to-date, relevant, and tailored training solutions that meet the needs of our local workforce, allowing individuals to find successful employment in in-demand careers that enable them to be self-sufficient.

Objectives:

- To meet the demands of today's workforce through training programs focusing on technical education and professional development, including soft skills such as communication, teamwork, problem-solving, and leadership.
- To support our customers by teaching them the job placement skills needed to succeed throughout the complete job-seeker life cycle.
- To provide a supportive and inclusive learning environment for all our students.
- To continuously improve and update our training programs to keep pace with the latest technology developments and industry trends in soft skills.

Management Philosophies

Computer Coach runs on the management of collective servant leadership and lean and agile management practices. The combination of management techniques is seen in our daily functions. Our CEO, Suzanne Ricci, is actively involved in everyday operations at Computer Coach. Although she has extensive experience in adult education and workforce development, Suzanne provides customer service and teaches if need be. In addition, she is instrumental in leading our job placement department ensuring customers understand the latest job search strategies. With this comprehensive hands-on approach to management, she is actively involved, which allows us to adapt, change and implement continuous improvement as needed to stay ahead of our competitors.

Service Delivery Philosophies

At Computer Coach, services are effective, predictable, reliable, and customer-friendly.

We believe:

- Providing high-quality training is a must: At Computer Coach, we offer up-to-date, relevant, and tailored training solutions to the needs of our local workforce. To do this, we stay current with the hiring needs of businesses, stay up to date with overall tech industry trends and technologies, and regularly update course materials to reflect our local communities' quality and hiring needs.
- Focusing on customer service: Computer Coach prioritizes the satisfaction and needs of our clients. We demonstrate this by offering flexible scheduling, providing personalized support and guidance, and being responsive to the feedback we receive.
- Encouraging hands-on learning: Computer Coach provides interactive and practical training rather than solely theoretical. To be successful in IT, you need to not only pass certification tests but be able to do the actual tasks when on the job. We ensure customers are successful by using real-world examples, offering lab and project-based exercises, and continuously providing opportunities for students to apply what they've learned.
- Emphasizing accessibility: At Computer Coach, we strive to make training accessible to a diverse range of students, including those with different backgrounds, abilities, and learning styles.
- Continual improvement: At Computer Coach, we regularly assess the effectiveness of our training and seek to improve it. Improvement plans are created by gathering feedback from



students, instructors, employer partners, and more. We then analyze performance data and make changes as needed.

Our Customers

For over 23 years, our CEO, Suzanne Ricci, has served the local community and workforce boards by delivering in-demand training for various IT and business careers. We have successfully recruited, trained, and placed CareerSource customers from all WIOA departments, including low-income adults, dislocated workers, and youth. In addition, throughout her tenure, Suzanne has personally overseen the successful implementation of workforce training, through provider contracts, with 12 of the 24 Florida Workforce Boards.

Our ability to successfully train and place various customers in employment sets us apart from our competitors and makes us uniquely qualified to implement the plan presented in this RFP.

Motivational Strategies

At Computer Coach, we know that if you work in workforce development, you genuinely want to help others. Therefore, we use various motivational techniques to ensure all team members are committed to providing excellent service and attaining the measurable performance outcomes we set. These include:

- **Training and development:** We believe in training over and repeatedly to ensure all individuals involved in the customer's life cycle with us are confident and comfortable and understand their roles and the impact they have on helping others.
- **Setting clear and attainable goals:** At Computer Coach, all employees are involved in setting clear and achievable goals for customer service and placement performance. If staff can be part of goal setting, understand what is expected of them, and are trained well, they can work towards achieving those goals with confidence and responsibility.
- **Providing regular feedback:** Regular feedback on customer service and performance helps staff understand what they are doing well and where we can improve. We hold weekly meetings to discuss these two items.
- **Recognizing and rewarding good performance:** At Computer Coach, we like to acknowledge and reward good performance. This can include shout-outs at company meetings, pizza parties for the whole team, or monetary incentives.
- **Encouraging open communication:** Encouraging open communication between staff and management helps to identify any issues and helps to find solutions to problems. Suzanne maintains an open-door policy.
- **Empowering staff:** Staff is authorized to make decisions and take ownership of their customer service interactions. This empowerment increases their motivation and engagement.

Special Strength

Computer Coach's strengths uniquely qualify us for selection as a contract recipient for this RFP. We pride ourselves in our expertise in jobs found in tech and tech-adjacent fields and the skills and approach necessary for individuals to land those jobs.

- **Our deep understanding of the industry** allows us to not only create courses that map to the needs of local employers but also allows us to cultivate strong relationships with those employers.



- Our active involvement in the community enables us to have an insider perspective of the local job market and stay ahead of the curve in our recruitment practices.
- Furthermore, our job placement, soft skills, and wrap-around courses and services ensure our candidates are well-prepared and ready to hit the ground running in their new roles. All these factors combined make us a leader in the IT training industry.
- We have clear and efficient processes in place which helps our team and customers achieve success by providing a structured approach to addressing their needs and goals. It ensures that all necessary steps are taken and that nothing falls through the cracks, allowing for a smooth and satisfactory outcome.
- We are community makers and will build a thriving networking community of professionals in Pasco and Hernando counties.



Proposal Narrative

Organizational Experience & Capabilities

(1.) Computer Coach Experience & Customers

Computer Coach's intention, mission, and philosophy for management and service delivery are contained on page 1 of the Abstract to this RFP response.

We see our customers in the CareerSource Pasco Hernando system being those who are classified as either youth (18 or older) or adult. Either candidate can be eligible based on low income or dislocated worker status. Individuals for our programs should be:

- looking to start a professional career in IT or business
- looking to pivot into a career in IT or business
- looking to upskill to improve their career in IT or business

We define our view of quality service to these customers as providing effective, short-term training programs tailored to meet specific in-demand IT and business roles within the workforce. In addition, we define quality service as providing ongoing and additional job placement classes and career coaching sessions to help the above individuals develop lifelong skills that will give them ongoing support as they progress through their careers.

We have outlined the strengths of our service, compared to other organizations, in the Abstract of this RFP on page 2. However, Computer Coach's approach to job coaching and job placement training will add significant value to CareerSource Pasco Hernando as a whole.

- We propose to teach and promote our currently running and highly successful job placement strategy classes online. Some in-person at the three CSPH centers will allow candidates receiving intensive services, not enrolled in WIOA, to attend and learn the skills they need, regardless of being enrolled in a Computer Coach program.
- Opening up our job search strategy and coaching webinars to all of CSPH will also allow employees of CSPH centers to attend and learn the skills, so they can continue to coach in the Computer Coach style after this contract has ended.
- CareerSource Pasco Hernando customers will have access to our proposed networking and community events, employer events, professional career transition groups, and professional field trips regardless of being enrolled in a Computer Coach program.

(2) Workforce Development Experience

For more than 20 years, our CEO has worked exclusively managing occupational skills training services, focusing on tech and tech-adjacent careers in the local market serviced by CareerSource Pasco Hernando. Since 2001 she has represented a company that has maintained a successful training provider contract with CareerSource Pasco Hernando the entire time. In addition to working with CareerSource Pasco Hernando, during her tenure, she has held and/or overseen successful training provider contracts with:



- CareerSource Capital Region
- CareerSource Citrus, Levy, Marion
- CareerSource Tampa Bay
- CareerSource Pinellas
- CareerSource Sarasota Manatee
- CareerSource Central Florida
- CareerSource Brevard
- CareerSource Space Coast
- CareerSource Broward
- CareerSource Palm Beach
- CareerSource Miami-Dade
- CareerSource Volusia

In addition to working with these workforce boards, Computer Coach possesses membership in the leading workforce associations. These associations are vital for us to continue learning and understanding the laws governing WIOA, developing innovative training practices, and finding new best practices for job placement. Computer Coach is a member of the National Association of Workforce Development Boards and the National Association of Workforce Development Professionals. Our CEO is signed up to attend both associations' national conferences to continue learning and understanding the WIOA laws and effective strategies for implementation.

In addition, our CEO and Admissions Director are candidates for the CWDP credential and will receive final acceptance of their applications in March.

As a result of this extensive knowledge and dedication to continuous learning and understanding of the workforce development system, we are well qualified to manage an integrated, multi-funded, and multi-program system. We have done it for more than 20 years.

Computer Coach's Job Placement Department

Our team has extensive experience developing and implementing cutting-edge solutions for job seekers. We understand the importance of staying current with the latest trends and technologies in the job market. We are committed to providing our students with the best possible job search skills so that they can utilize these skills throughout the rest of their careers.

Some of the innovative job seeker services that we offer include:

- Virtual career fairs and employer meet and greets: We utilize virtual career-ready technology to create an immersive and interactive experience for job seekers, allowing them to connect with employers, explore job opportunities, and expand their network from the comfort of their own homes.
- Chatbots for job search assistance: We teach how to utilize AI-powered chatbots to provide job seekers with personalized job search assistance, including resume review, job matching, and interview preparation.
- Video resumes: We assist job seekers in creating professional video resumes that showcase their skills and experiences dynamically and engagingly.
- Social media recruiting: We help job seekers learn how to use social media platforms as a job seeker tool by creating engaging and shareable content to reach and attract potential employers.



- **Employer Relationship Management:** We help job seekers build and maintain relationships with potential employers by providing them with networking, outreach tools, and opportunities.
- **Job search strategy workshops:** We teach job seekers how to use multiple strategies to find a job by providing seminars on effective job search techniques, such as networking, LinkedIn, interviewing techniques, resume building, and more.
- **Networking events:** We host networking events that bring together employers and candidates, providing job seekers the opportunity to meet potential employers, learn about job opportunities, and establish professional connections.
- **Job search coaching:** We provide one-on-one coaching sessions to help job seekers to identify their strengths and weaknesses, set realistic career goals, and develop an action plan to find employment.
- **Micro-internships:** We connect job seekers with short-term, real-world projects and employment opportunities, also known as "micro-internships," that provide them with valuable work experience and the chance to showcase their skills to potential employers.
- **Skill-building programs:** We offer additional skill-building programs that teach job seekers in-demand skills, such as coding, data analysis, and digital marketing, to help them to stand out in the job market. These workshops are short webinars designed to help job seekers add on skills in addition to their training programs. We call these workshops Micro-Learning opportunities.

We are confident that our innovative job placement services set us apart from other training centers and are the key to our customer's success. In addition, we have provided references to our commitment to our community and our student's success.

(3) Performance Outcomes

Computer Coach tracks placement and retention rates for our 13 programs licensed by the State of Florida, Department of Education, Commission for Independent Education. As a state-licensed educational institution, we must maintain a 50% retention rate and a 60% placement rate. Each year, Computer Coach exceeds the minimum requirements placed by state requirements.

The below table outlines our programs and placement data.

Program Name	Completion Rate	Placement Rate	Average Salary
Help Desk Technician	N/A	N/A	\$16.58**
Digital Marketing Specialist	96%	77%	\$19.50
Business Project Specialist	91%	80%	\$20.28
Data Analyst	95%	76%	\$28.52
Business Analyst	N/A	N/A	\$19.33**
Front End Development	92%	72%	\$21.50
Cybersecurity Specialist	100%	80%	\$24.03



*** Items listed with ** are anticipated salaries as these are new programs put together as requested by this RFP. These programs comprise individual courses we have experience running in other programs, so we don't have data for this specific item listed above.*

For any questions about the above table, don't hesitate to contact Suzanne Ricci (813) 947-0552 or Mobile (813) 299-1812 or via email [at suzanne@computercoach.com](mailto:suzanne@computercoach.com).

(4) Financial and Administrative Experience and Capabilities

Computer Coach is licensed by the State of Florida, Department of Education, Commission for Independent Education. Computer Coach must supply reviewed financials to the State of Florida each year as a state-licensed educational institution. With this, it is required we adhere to GAAP standards.

As a result of the requirements by the State of Florida, we are comfortable and confident we can work within multiple MIS systems to maintain and submit accurate data.

Each year we conduct self-monitoring to ensure we comply with the State of Florida requirements to maintain licensure. This self-monitoring and compliance check is engrained in our processes and procedures. In addition, we have specific tasks we do monthly to ensure annual compliance.

Continuous Improvement Policy for Computer Coach Training Center

Computer Coach has a policy for continuous improvement for the company, and we would use the same policy structure to develop a CI plan for this specific contract. Adjustments may be needed, but we are confident in our ability to adjust since we have the experience. See attached policy.

(5) Key Staff

Suzanne Ricci, CEO & President – Computer Coach – Suzanne Ricci will oversee the successful implementation of the contract and compliance and ensure we are meeting the required metrics. Suzanne will also be responsible for career coaching, job placement training, and employer connections. *Her professional bio is included for review.*

Suzanne will be successful on this project because of her extensive experience in the technology industry and her deep understanding of the ever-evolving landscape of technology. Her expertise in workforce development and her knowledge of adult education principles would be particularly valuable in ensuring that the training provided is tailored to the workforce's specific needs and that the training methodology effectively engages adult learners. Her experience in running her company, Computer Coach, and her reputation in the technology training space would also bring valuable knowledge and skills on managing and leading a technology training project.

Kassandra Perez, Admissions Director – Computer Coach – Kassandra Perez will oversee the recruitment of qualified candidates into appropriate programs and help with job placement and employer connections. *Her professional bio is included for review.* **Kassandra Perez will be the local assigned lead to this project.**



Kassandra Perez, the Admissions Director, will be successful on this project because of her 12 years of experience in adult education, career coaching, and technology. Her expertise in adult education and career coaching would be particularly valuable in providing guidance and advice to prospective students and ensuring that they are placed in the right course for their experience and career aspirations. Her technology knowledge would also benefit students with information about the skills and knowledge they need to succeed in today's tech-driven job market.

Amy Knecht – Registrar & Customer Success – Computer Coach – Amy provides customer service and registration into the classes at Computer Coach. *Her professional bio is attached.*

Amy Knecht, the Registrar and Customer Success Advocate would also be successful on this project because of her strong understanding of the needs of adult learners and her dedication to ensuring that every student has a positive and successful learning experience. In addition, her background in education and customer service would be valuable in managing the enrollment process and providing support to students throughout the program.

Open Position: Computer Coach intends to add a Community Impact Manager to the team if awarded this contract. We have identified several possible candidates so that we can move fast in hiring and onboarding. Hiring someone specifically to job develop for the candidates enrolled through this grant will improve the prospects of meeting all metrics required. We recognize this proposal is to recruit, train and place 56 individuals within a short time frame. Having an individual dedicated to these individuals will help improve the prospects of exceeding all required metrics.

B. Service Delivery

(1.) Pasco Hernando Experience

The CareerSource Pasco Hernando region's unemployment rate was 2.9 percent in November 2022. This rate was 0.5 percentage points lower than the region's year-ago rate of 3.4 percent. The region's November 2022 unemployment rate was 0.3 percentage points above the state rate of 2.6 percent. The labor force was 337,356, up 14,745 (+4.6 percent) over the year. There were 9,816 unemployed residents in the region.

At Computer Coach, our leadership has worked with CareerSource Pasco Hernando organization and within the Pasco Hernando communities for 20 years. So we are very familiar with the market, the opportunities, and the barriers. The lead contact for this proposal, Kassandra Perez, is a Pasco County resident and has been for 18 - years.

(2.) Staffing Plan

Our team comprises highly qualified and experienced professionals committed to providing our clients with the best possible service. Our team includes:

Lead Staff - Suzanne Ricci –See her bio in the packet and her responsibilities for this contract in section A(5) above. Also, see her LinkedIn profile for professional experience.

Lead Staff - Kassandra Perez - See her bio in the packet and her responsibilities for this contract in section A(5) above. Also, see her LinkedIn profile for professional experience.



Amy Knecht – See her bio in the packet and her responsibilities for this contract in section A(5) above. Also, see her LinkedIn profile for professional experience.

Community Developer – Open position that will source jobs and set up events for candidate recruitment.

Trainers – Industry-experienced professionals who lead our courses. The number of trainers depends on the programs that are scheduled.

Position	Number	Location
Recruitment	2	Remote and in CSPH offices as needed.
Placement	2	Remote and in CSPH offices as needed.
Customer Service	1	Remote
Trainers	10	Remote, live online and hands-on.

(3.) The Computer Coach Plan

We are excited to submit our plan for a comprehensive program to recruit, train, and place 56 Pasco Hernando residents in jobs that pay above \$15.50 per hour. Our proposed program is designed to attract and retain students and provide them with the skills and resources they need to succeed in the workforce.

Our **recruitment strategy** is designed to reach a broad audience and attract potential candidates through multiple channels. Therefore, we will utilize the following techniques:

- **Social Media Campaigns:** Utilize popular social media platforms such as Facebook, Instagram, and LinkedIn to reach a large audience and attract potential students. Create visually appealing graphics and videos highlighting the benefits of the program and the potential for high-paying jobs.
- **Host Information Fairs:** Organize information fairs where students can learn about the opportunities in Information Technology and the WIOA grant at various locations around Pasco-Hernando counties and online.
- **Utilize Our Extensive Alumni Network:** Connect with alums from previous CSPH customers and encourage them to refer friends and family to the program.
- **Host Community Events:** Computer Coach is very involved in the local tech community. We host events under various brands, and we will start to host events throughout Pasco-Hernando counties, such as LinkedIn Local Tampa Bay, Talent Acquisition Mixers, High-Tech Connect, and more.
- **Leverage the power of word of mouth:** Encourage students to speak about the program and their experiences to their friends, family, and the local community.



- Community Recruitment: Visit and participate in local events to give presentations about the program and recruit qualified participants.
- Community Outreach: Collaborate with local community organizations and non-profits to reach potential students from underserved communities.
- Advertising: Place ads in local newspapers, magazines, and on local radio stations to reach a wider audience, as needed.
- Email Marketing: Create an email marketing campaign targeting potential students and promoting the program's benefits.

We can effectively attract and recruit 56 qualified students to the program with these recruitment strategies and others that we currently use.

Training

Our **proposed training programs** are designed to prepare candidates for high-paying jobs in the tech and business fields. The programs include hands-on training that will allow students to apply what they have learned in real-world scenarios. In addition, each program provides portfolio building to help aid in job placement. Each program maps to one or more job titles in the metro area where Pasco-Hernando residents' work.

In addition, to our high-quality courses, each individual enrolled in a Computer Coach program has access to the following:

- Industry Instructors: Our instructors are industry experts. This ensures the program is up-to-date with the latest trends and technologies in the field.
- Online Platforms: We utilize online learning platforms to reinforce learning and allow students additional learning opportunities (micro-learning) to become more marketable in their job search.
- Guest Speakers: We invite guest speakers from the industry to share their experiences and insights with the students. This will give students a broader perspective on the field and help them connect with industry professionals.
- Mentoring: We provide students with mentors who will guide and support them throughout the program. These mentors will be industry professionals who provide guidance and feedback on the candidates' work.

With these training strategies, we are confident that our students will be well-prepared for high-paying jobs in their fields of interest. Each program is available part-time or full-time to allow flexibility for adult students. In addition, as noted below, Computer Coach will provide additional scholarships (not loans) to individuals qualified for WIOA and our programs, so we can help candidates without them going into further debt.

Program Name	Length of Program	Cost to CSPH	CC provided Scholarship
Help Desk Technician	4 weeks full-time 9 weeks part-time	\$6000.00	\$6000.00
Digital Marketing Specialist	3 weeks full-time 8 weeks part-time	\$6000.00	\$4000.00
Business Project Specialist	4 weeks full-time 9 weeks part-time	\$6000.00	\$4000.00
Data Analyst	4 weeks full-time 9 weeks part-time	\$6000.00	\$6000.00
Business Analyst	4 weeks full-time 9 weeks part-time	\$6000.00	\$6000.00
Front End Development	5 weeks full-time 12 weeks part-time	\$6000.00	\$8000.00
Cybersecurity Specialist	5 weeks full-time 12 weeks part-time	\$6000.00	\$8000.00

Job Placement Plan

At Computer Coach, our commitment to our community and our community presence is unmatched. Our top-quality training utilizes project-based learning philosophies and hands-on learning techniques to ensure our students are prepared for their tasks when employed. However, our job placement is what really sets us apart from others. Our commitment to successfully teaching our students how to navigate a job search is unseen in Tampa Bay. As a result of these techniques, we have maintained a XX overall placement rate for the last xx years. We plan to bring these techniques to this contract and teach the 56 students we propose to train, as well as the CareerSource Pasco Hernando staff, so they can continue to help guide individuals in the Pasco-Hernando communities once the contract has ended. Some of our placement techniques include:

- **Career Counseling:** Offering one-on-one career counseling sessions to help students identify their strengths, interests, and goals and develop a job search strategy.
- **Networking and Volunteering Opportunities:** Helping students connect with alumni, professionals in their field, and other industry contacts through networking events, career fairs, community volunteering, and more.
- **Job Search Skills Webinars:** Teaching students how to search for jobs, use job search engines, navigate online job boards, write resumes, interview, etc. We offer weekly webinars and weekly coaching circles to Computer Coach customers.
- **Mock Interviews:** Conduct mock interviews to help students practice answering common interview questions and improve their interviewing skills.
- **Micro-Internships:** Encouraging students to take short-term projects or micro-internship opportunities while in class to gain experience and make connections in their desired field.



- Job Shadowing & Information Interviews: Arranging for students to shadow professionals in their desired field to learn more about the day-to-day responsibilities and opportunities in that industry.
- Employer Outreach: Building relationships with employers and actively promoting our students to potential employers. Through a dedicated job developer who will have specific metrics to meet.
- Career Services: Provide students with access to career services such as job search assistance, career counseling, resume review, mock interviewing with industry professionals, so they can learn, expand their network, and meet future employers in a non-formal way.
- Virtual and In-Person Job Fairs: Hosting or participating in job fairs where students can interact with employers and learn about open positions in their chosen field.
- Alumni Mentorship: Connect students with alumni who can serve as mentors and guide them in their job search or issue referrals.
- Leverage Technology: Utilizing virtual job fairs, online networking platforms, and resume databases to connect students with potential employers.

In addition to recruitment, training, and placement, we believe that follow-up and support to our customers are critical to their ongoing success. Therefore, through our Customer Support Advocate, we provide ongoing follow-up and support to students even after securing a job to ensure their successful transition into the workforce. These services are customized to the student's particular needs and are arranged one on one.

(4.) Continuous Improvement

At Computer Coach, improving is part of what we do. Our plan for maintaining continuous improvement includes a comprehensive approach to data collection, reporting, analysis, and corrective action.

First, we will establish a robust data collection process that includes metrics for measuring performance against our recruitment, training, and placement goals. We currently have this in place and use software and other tools to track goals, satisfaction, completion, and more.

Next, we will establish a reporting mechanism that allows us to review and analyze the data we collect regularly. This will involve creating a system for compiling and presenting the data in a meaningful and actionable way. Currently, we meet as a team each week and review the metrics. These weekly meetings allow us to pivot quickly, reinforce any positive measures working and correct anything less than ideal.

Once we have collected and analyzed the data, we will use the insights gained to identify areas for improvement and implement corrective action. This will involve developing and implementing plans to address any identified issues or challenges. As mentioned above, we currently do this weekly and will bring those same strategies to this contract to ensure successful implementation.



In addition, we will be engaging in regular training and development for our team members assigned to this contract to ensure they have the necessary skills and knowledge to identify, analyze and implement corrective actions as we do in our day-to-day operations.

Our approach to continuous improvement is data-driven, action-oriented, and focused on achieving our performance goals. Our approach will help us continuously improve and meet the goals in this RFP.

(5.) Innovative Delivery Methods

As a small, personalized learning environment, Computer Coach can create, implement, and manage innovative solutions for our customers. Some of the innovative solutions we use and will continue to use for the successful implementation of this contract include:

Recruitment: As outlined above, we have several innovative strategies in B(3).

Training: In addition to what is outlined in (B3), some of the innovative strategies we use in our training include: virtual reality to simulate the real world, gamification, additional microlearning opportunities, project-based learning, mentoring, social learning, and blended learning opportunities.

Placement: Outlined above in B(3), we have several innovative strategies

Compliance, Improvement: As outlined above in B(4), we have discussed how we will discuss continuous improvement and monitoring to ensure compliance. In addition, we have a system where students can message suggestions anonymously at any time, so they don't have to wait for checkpoints from the school. We like to take a proactive approach.



PASCO-HERNANDO WORKFORCE BOARD, INC. Budget Forms –

RFP # 01-01042023 WIOA AD/DW_WT

Budget Item	Annual Cost	In-Kind	How Cost is Determined	Justification	Board Use Only		
					Res.	Nec.	Basis
56 Student Tuition @ \$6000 each	\$336,000.00		Tuition- \$6000 each				
Recruitment 56 Students	\$50,400.00		Recruitment not to exceed \$900 per enrollment				
New Salary Community Impact & Job Developer – 4 months	\$13,600.00		4 months of full time salary only.	Salary for Job Placement			
Salary Customer Advocate – 12 months – 1/5 time (includes follow up)		\$8,580.00	12 months 20% salary, so this position can follow up and maintain reporting as required.	Salary for data tracking & CX			
Salary Admissions Director – 4 months – ¼ time		\$37,500.00	12 month – ½ time to recruit students for this particular contract, oversight, placement, etc.	Salary for recruitment			
Student – Books and Supplies		\$56,000.00	Estimated cost due to actual courses unknown	COGS			
Program / Profit – 10%	\$40,000.00						
Total	\$400,000.00						

5. Budget

A. **Detailed Budget Narrative:** The proposed overall budget Computer Coach is requesting is \$400,000.00. Due to our ongoing operations, we were able to simplify this budget and allow for many shared costs with our other ongoing operations.

Computer Coach is requesting approval to recruit, train, and place 56 CSPH customers. Each individual trained will need an ITA for \$6000.00. Computer Coach will provide an allowable scholarship to everyone approved under this contract, so CSPH customers do not have out of pocket expenses to learn their new skills.

$$56 \text{ customers} \times \$6000.00 = \$336,000.00$$

The second line item in the proposed budget is the recruitment expenditure. Computer Coach proposed to spend \$900 per person to recruit 56 individuals qualified for the CSPH WIOA program. We anticipate this cost being \$900 per person because CSPH region has a historically low unemployment rate. To find qualified candidates we will need to get involved in the local community in a very large way and very fast, since the duration of this contract is only 4 months. We have outlined in Section B (3.) some of our innovative and proposed strategies, there are more, but it will require a budget to recruit.

$$56 \text{ customers} \times \$900.00 = \$50,400$$

Community Impact & Job Developer: This position is proposed in the budget to CSPH because we feel we need a person dedicated to recruitment and job development for the 56 students who will be in the program. Having a dedicated person to just Pasco-Hernando recruitment and placement (in addition to our current team members) drastically improves the chances of this contract being successful.

Salary: $\$40,800 / 12 = \$3,400.00$ This is the monthly salary (not including employer burden, benefits, PTO, etc.) Because this person will work on the contract March, April, May, June under this budget the total requested reimbursement salary costs is \$13,600.00. Please note, Computer Coach is covering (in-kind) the employer burden, benefits, PTO, etc. which are not in this budget because they can vary depending on the employee recruited. This position will continue to work for Computer Coach following this contract and will still work on Job Development for existing students from this contract.

The contract will represent approximately 20% of Computer Coach's overall budget. As a result, we have listed in-kind salary for Customer Advocate at 20% time. Because there is no way to know how much time she will actually spend with these 56 customers, Computer Coach is listing this as an in-kind contribution and not requesting reimbursement.

We anticipate our Admissions Director, who is our lead for recruitment and placement on this contract and the point of contact for CSPH WIOA Counselors will spend 50% of her time on this contract. We have listed 50% of her salary as in-kind.



Books and materials: We have proposed 7 training programs in this RFP in section B(3). We have proposed 7, so we have options to recruit a diverse candidate base, quickly, considering the historically low unemployment. As a result, we don't know exactly how many students will enter each program. As a result, Computer Coach will absorb the costs of any books or materials needed for candidates to be successful. This includes books, online review courses, certification exams (if applicable), etc. Usually this is approximately \$1000 per student, so we estimated 56 students * \$1000.00 = \$56,000 in kind contribution.

5.B – Cost Allocation: Computer Coach has cost of salaries based on percentage of time spent on this contract: This method involves determining the percentage of time each staff member is spending on the contract, and then allocating a corresponding percentage of their salary to the contract. For example, if a staff member is spending 50% of their time on the contract, 50% of their salary is allocated to the contract on the budget.

In addition, we have used direct allocation method: Directly allocating costs to the cost objects, in this case, the contract. For example, the job developer and community impact employee will be working exclusively on this contract and the salary cost is directly related to that contract.

We based the cost of tuition on the current tuition charged to CareerSource Pasco Hernando.

5.C – In-Kind Contributions: Computer Coach has listed all in-kind contributions and has given a detailed outline of each item in the narrative in 5.A.

5.D - Contingency Plans: Computer Coach plans to have a clear and transparent accounting system and regular review process in place to prevent disallowed costs. However, we recognize that disallowed costs may occur in a contract. If we needed to repay the contract Computer Coach will:

- Set aside a portion of funds from the project budget specifically for repaying any disallowed costs. This portion can be determined in contract negotiation.
- Negotiating a repayment plan with the PHWB that includes a schedule for repaying the disallowed costs over a specified period of time.
- Reviewing the project's financial records and implementing any necessary changes to ensure compliance with PHWB regulations and guidelines.
- Identifying and implementing cost-saving measures to offset any disallowed costs.

5.E – Financial Support: Computer Coach will support this contract through internal funds. Computer Coach is financially stable and able to support until payments can be made.

5.F - Method of Payment: Computer Coach is proposing a cost-reimbursement contract with a demonstrated performance holdback. Computer Coach proposes a holdback of 10% to be paid at the end of the contract if 50% of candidates enrolled complete and 60% of candidates are employed.

5.G – Budget Percentage: If funded this contract represents 20% of Computer Coach's overall budget. Computer Coach is proposing general tuition paid for 56 students and reimbursement of specific costs that will be incurred to take on this specific contract. We anticipate the profit to be around 10%.

5.H – Direct Program Costs: Computer Coach will keep detailed records and will specify the budget for this contract separately, so it can be monitored separately.

6. Value-Added Services

As a leading provider of computer education and training, Computer Coach offers a wide range of value-added services to the Pasco Hernando community. Not only do we provide a variety of classes and workshops to improve computer skills, but we also offer customized training solutions for businesses, career development services for our customers and the public, and through this contract we will start offering networking events in the areas serviced by CSPH. These events could include workshops, seminars, and meetups that bring together professionals and experts in the technology or technology adjacent fields. These events can provide an opportunity for attendees to learn from industry leaders, network with other professionals, and stay current on the latest trends and developments in technology and the other areas of Computer Coach courses. Computer Coach will organize networking events that connect job seekers and employers, which can help to promote local job opportunities and support the local economy. This will bolster the current professional community as they will have these events within Pasco and Hernando counties and will not have to drive to Tampa.

Computer Coach events will promote Career Source Pasco Hernando as our partner in all events, which will give more name recognition to the local workforce development board and ultimately reinforce the brand as a strong community resource.

In addition, Computer Coach adds value because:

- **Flexibility:** Computer Coach provides students with multiple options for class schedules and learning formats. This makes Computer Coach a great option for those with busy lives or other commitments.
- **Innovation:** Computer Coach is at the forefront of new technologies and teaching methods, providing students with cutting-edge education.
- **Personalization:** Computer Coach provides a more personalized learning experience, with tailored curriculum and instruction based on individual student needs and goals.
- **Accessibility:** Computer Coach is live online which allows a wider range of students, including those in remote or under-served areas to take training and look for remote work opportunities if this is a desire for them.
- **Cost-effective:** Computer Coach offers more cost-effective education options compared to traditional brick and mortar institutions.
- **Job-oriented programs:** Computer Coach's programs are often focused on providing job-oriented programs that help students gain in-demand skills and improve their career prospects.
- **Interactive learning:** Computer Coach uses interactive learning methods, such as simulations, games, and virtual reality, to make learning more engaging and effective.
- **Collaboration:** As mentioned about Computer Coach is all about fostering collaboration among students, and among the community which allows students to learn from each other and will build a sense of community among professionals in Pasco and Hernando counties.



Suzanne Ricci

CEO, Computer Coach Technology Training Center

Suzanne Ricci is the CEO and founder of Computer Coach Training Center, a leading provider of technology training and education. With over 20 years of experience in the EdTech industry, Suzanne has a deep understanding of the ever-evolving workforce landscape and the crucial role technology training plays in today's business world.

Suzanne began her career as a front-end developer, quickly rising through the ranks to become a technology manager at a large commercial real estate firm. Recognizing the need for ongoing training and education to keep pace with the rapid advancements in technology, she founded her first school LaSalle Computer Learning Center in 2002. After selling LaSalle to the largest private equity group specializing in the knowledge sector Suzanne oversaw the acquisition and implementation of continuing education training centers in 7 colleges throughout the State of Florida.

Realizing her passion for helping others, her commitment to continuing education and her love of entrepreneurship Suzanne founded Computer Coach in 2017.

Under Suzanne's leadership, Computer Coach has grown to become one of the most respected technology training centers in the state, offering a wide range of courses and programs for individuals and businesses of all sizes. The company's unique approach to training combines hands-on experience with expert instruction, a thorough understanding of adult education principles, and workforce development, ensuring that students leave with the skills and knowledge they need to succeed in today's tech-driven job market.

Suzanne is also a strong advocate for diversity and inclusion in the technology industry, and a strong supporter of the local technology community. She organizes several events per year, such as networking opportunities, workshops and conferences, to bring together members of the local tech community and provide them with the resources they need to succeed. She also implements programs and initiatives at Computer Coach to encourage and support underrepresented groups in technology and is a frequent speaker and mentor on the topic.

With her leadership and expertise, Suzanne continues to position Computer Coach as a leader in the technology training space, helping individuals and businesses stay ahead of the curve in an ever-changing technological landscape, while also making positive impact on the local technology community.

In addition, Suzanne possesses 25 IT certifications and is a candidate for the prestigious Certified Workforce Development Professional (CWDP) certification and is expected to obtain full status by March 2023.

Contact Information:

Email: suzanne@computercoach.com

LinkedIn: <https://www.linkedin.com/in/SuzanneRicci>

Twitter: @SuzanneRicci



Kasandra Perez

Admissions Director, Computer Coach Technology Training Center

Kasandra Perez is the Admissions Director at Computer Coach Training Center, a leading provider of technology training and education. With over 12 years of experience in adult education, career coaching, and technology, Kasandra brings a unique combination of skills and expertise to the team at Computer Coach.

As Admissions Director, Kasandra is responsible for overseeing the enrollment process for all of Computer Coach's courses and programs. She works closely with prospective students to understand their individual needs and goals and helps them navigate the enrollment process to ensure that they are placed in the right course for their level of experience and career aspirations.

Kasandra's experience in adult education and career coaching enables her to provide valuable guidance and advice to prospective students, helping them to make informed decisions about their education and career paths. She is also well-versed in the latest technology trends and is able to provide students with information about the skills and knowledge they need to succeed in today's tech-driven job market.

In addition to her role as Admissions Director, Kasandra also provides career coaching to students and alumni, helping them to develop career plans, prepare for interviews, and secure job opportunities.

Kasandra's dedication to student success, her vast experience in adult education and technology, and her passion for helping people achieve their career goals, make her a valuable asset to the Computer Coach team.

Kasandra is a candidate for the prestigious Certified Workforce Development Professional (CWDP) certification and is expected to obtain full status by March 2023.

Contact Information:

Email: kasandra@computercoach.com

LinkedIn: <https://www.Linkedin.com/in/Kasandra-Perez>



Amy Knecht

Registrar & Customer Success Advocate, Computer Coach Technology Training Center

Amy Knecht is the Registrar and Customer Success Advocate at Computer Coach Training Center, a leading provider of technology training and education. With over 20 years of experience in customer service, Amy has a strong understanding of the needs of adult learners and is dedicated to ensuring that every student at Computer Coach has a positive and successful learning experience.

As Registrar, Amy is responsible for managing the enrollment process for all of Computer Coach's courses and programs. She works closely with students to ensure compliance with all required documents and helps them navigate the enrollment process to ensure they are in the classes they need to help them reach their defined career goals.

As a Customer Success Advocate, Amy is dedicated to ensuring that every student at Computer Coach has the support they need to succeed. She serves as a point of contact for students, answering questions and providing guidance on coursework and other aspects of the program. She also provides one-on-one support to students who may be struggling, helping them to overcome any obstacles and stay on track to achieve their goals.

Amy's passion for education and dedication to student success makes her a valued member of the Computer Coach team. She is committed to ensuring that every student leaves the program with the skills and knowledge they need to succeed in today's tech-driven job market.

Contact Information:

Email: amy@computercoach.com

LinkedIn: <https://www.linkedin.com/in/AmyMKnecht>



COMPUTER COACH

Continues Improvement Policy

Purpose: This policy aims to establish a framework for continuous improvement at Computer Coach. The policy seeks to ensure that the center provides the best possible training to its students and continuously improves its services.

Scope: This policy applies to all employees, instructors, and students of the CCTC.

Continuous Improvement Team: A continuous improvement team will be established to lead the implementation of the continuous improvement policy. The team will be composed of representatives from different departments, such as instruction, administration, and student services.

Identifying Areas for Improvement: The continuous improvement team will use various tools and techniques to identify areas for improvement, such as student feedback, course evaluations, and performance data.

Developing and Implementing Improvement Plans: Once areas for improvement have been identified, the continuous improvement team will develop and implement improvement plans. These plans will include specific, measurable goals and objectives, as well as timelines for completion.

Monitoring Progress: The continuous improvement team will monitor progress towards the goals and objectives of the improvement plans and make any necessary adjustments. They will also measure the impact of the improvements on key performance indicators (KPIs) such as student satisfaction, graduation rates, and job placement rates.

Employee Involvement: All employees, instructors, and students are encouraged to identify improvement areas and participate in the continuous improvement process. They will be provided with the necessary training and resources to contribute to the process.

Communicating Progress: The continuous improvement team will regularly share the progress and results of the ongoing improvement process with all employees, instructors, and students.

Review and Update: The continuous improvement policy will be reviewed and updated regularly to ensure that it remains relevant and effective.

By implementing this continuous improvement policy, Computer Coach will be able to identify and improve its training programs and services, leading to increased student satisfaction, better graduation and job placement rates, and improved overall quality of training. The center will also create a culture of continuous improvement, where all members are encouraged to identify and implement improvements, leading to increased engagement and motivation.

ORGANIZATIONAL BACKGROUND

1. Name of Organization: Computer Coach Training Center
2. Contact Person: Suzanne Ricci
3. Address: 5005 N Hesperides Street, Tampa, FL 33614
4. Telephone Number: 813-947-0552 5. FEID Number: 65-1106229
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 Florida, or 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 its proposed program;
 - f. it will comply with the assurances attached to this RFP, and the WIOA 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.

Computer Coach Training Center

Organization

Suzanne Ricci



1/25/2023

Name of Certifying Official

Signature

Date

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.

- | | |
|---|---|
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 1. All positions with the proposing agency have up-to-date job descriptions. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 2. All employees meet the minimum qualifications specified in their job descriptions. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 3. All W-2's and I-9's with appropriate documentation are on file. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 4. Withholding and FICA deposits have been made in full on a timely basis. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 5. Insurance and bonding policies are current and all appropriate staff are covered. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 6. The facilities of this agency and any training location are accessible to the disabled. Attach a completed ADA facility checklist. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 7. The books of account are auditable. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 8. Administrative and internal accounting controls are adequate to safeguard program assets. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 9. The accounting system adequately accounts for program funds. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 10. Financial reports fairly present accrued program expenditures by established cost categories. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 11. Budgetary procedures are adequate to control expenditures. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 12. The agency has a written accounting procedures manual that includes procedures for: |
| | a) coding of expenditures by: |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | (1) contract year or program year |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | (2) funding source |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | (3) cost category; |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | b) bank reconciliations |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | c) posting to books |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | d) monthly close-out |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | e) trial balancing |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | f) development of accruals |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | g) segregation of duties |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | h) cost allocation |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | i) budgetary control |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | j) cash management |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | k) cash receipt and disbursement |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | l) payroll |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | m) reconciliation of any petty cash fund |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 13. The procedures in the accounting manual are being followed. |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 14. Internal controls |
| | a) for cash receipts: |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | (1) cash is properly controlled and promptly deposited when received |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | (2) funds are deposited in a bank in interest bearing checking accounts and secured by FDIC or other security |
| | b) checks are: |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | (1) pre-numbered |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | (2) adequately safeguarded |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | (3) properly mutilated when voided |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | (4) not allowed to be written for cash |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | (5) not allowed to be signed in advance; |

- ☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
- c) for cash disbursements:
- (1) invoices are approved prior to payment
 - (2) documentation accompanies checks to be signed
 - (3) documentation is stamped to prevent reuse
 - (4) control over signature machine is adequate
 - (5) disbursements are made only by check
 - (6) checks are not returned to preparer after signing
- d) for bank reconciliations:
- (1) they are performed on time
 - (2) they are performed by someone who does not perform cash functions
 - (3) unusual items are investigated promptly
- e) for payroll:
- (1) time sheets are used and signed by both the employee and supervisor
 - (2) payrolls are approved by management for accuracy and existence of bona fide employees
 - (3) preparation and check distribution functions are segregated
 - (4) leave time is properly controlled
- f) for purchases:
- (1) purchase orders are pre-numbered and controlled
 - (2) receiving reports are prepared and compared to P.O. and invoice
 - (3) returned purchases are controlled
 - (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.

Computer Coach Training Center

Organization
Suzanne Ricci



1/25/2023

Name of Certifying Official

Signature

Date


CONFLICT OF INTEREST STATEMENT/CERTIFICATION

Contract No: **RFP #** RFP # 01-01042023 WIOA AD/DW_WT

The Contractor 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 Grantee or independent agency requiring the goods or services described in these specifications has a material financial interest in this company.

 _____ Signature	Computer Coach Training Center _____ Company Name
Suzanne Ricci _____ Name of Official (Type or Print)	5005 N Hesperides Street _____ Business Address
Tampa, FL 33614 _____ City, State, Zip Code	

SECTION II

I hereby certify that the following named Grantee official(s) and employee(s) having material financial interest(s) [in excess of 5%] in this company have filed the appropriate Conflict of Interest statements with the Grantee prior to the beginning date of this Contract.

Name	Title or Position	Date of Filing
_____	_____	_____
_____	_____	_____
_____	_____	_____

_____ Signature	_____ Company Name
_____ Name of Certifying Official	_____ Business Address
_____ City, State, Zip Code	

FEDERAL AND FLORIDA COMPLIANCE ASSURANCES AND CERTIFICATIONS

The parties (hereinafter referred to as “Contractor”) acknowledge and certify that, to the extent applicable to this contract/agreement, funding source, program activities, and statutory requirements, the parties shall comply with the following (if applicable):

APPENDIX II TO PART 200—CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS

- A. **TERMINATION PROVISIONS (CONTRACTS OF \$150,000).** Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate. The parties agree that in the event Contractor shall fail to comply with any term, provision, or condition of this Agreement, then in the absence of a remedy provision contained elsewhere in the Master Agreement, Pasco-Hernando Workforce Board, Inc. may at its sole election terminate this Agreement without being liable to prosecution or may bring a claim for specific performance or may bring an action to recover damages caused by such breach. Additionally, Pasco-Hernando Workforce Board, Inc. (PHWB) may consult with an attorney concerning PHWB’s rights hereunder, and Contractor agrees in each and any such case to pay to PHWB its reasonable attorney’s fees therefore.
- B. **TERMINATION PROVISIONS (CONTRACTS OF \$10,000).** All contracts in excess of \$10,000 must address termination for cause and for convenience by the non-Federal entity including the manner by which it will be effected and the basis for settlement. The parties agree that in the event there is no provision contained elsewhere in the Master Agreement to the contrary, then the Parties agree that this Agreement may be terminated by either party with, or without, cause upon thirty (30) day’s prior written notice. Further, PHWB is a quasi-governmental entity reliant in part on funding received from governmental grants. Accordingly, notwithstanding anything else contained herein to the contrary, PHWB shall have the right to terminate the Agreement or any of the agreements comprising the Master Agreement by reason of funding unavailability at any time by providing thirty (30) days advance written notice. If this agreement is terminated, all payments defined therein shall cease to be due as of the date of termination.
- C. **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of “federally assisted construction contract” in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 CFR part 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”
- D. **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. 3141-3148).** When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to

laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or sub-recipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

- E. **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. 3701-3708).** Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.
- F. **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or sub-recipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or sub-recipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.
- G. **CLEAN AIR ACT (42 U.S.C. 7401-7671q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. 1251-1387), AS AMENDED.** Contracts and sub-grants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).
- H. **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 CFR 180.220) must not be made to parties listed on the government-wide

exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

- I. **BYRD ANTI-LOBBYING AMENDMENT (31 U.S.C. 1352).** Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.
- J. **SOLID WASTE DISPOSAL ACT, AS AMENDED BY THE RESOURCE CONSERVATION AND RECOVERY ACT (42 USC 6962; 2 CFR §200.322).** A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.
- K. **TRAFFICKING VICTIMS PROTECTION ACT OF 2000 (2 CFR 175.15(B)).** During the term of the Agreement, Contractor, and its employees, may not engage in severe forms of trafficking in persons, procure a commercial sex act, or use forced labor in the performance of the Agreement.
- L. **VETERAN'S PRIORITY OF SERVICE PROVISIONS (38 USC 4215; 20 CFR 1010).** A covered person is entitled to priority of service under any qualified job training program if the person otherwise meets the eligibility requirements for participation in such program. An entity of a State, a political subdivision of the State, or in this case, a Contractor, that administers or delivers services under a qualified job training program shall provide information and priority of service to covered persons regarding benefits and services that may be obtained through other entities or service providers; and ensure that each covered person who applies to or who is assisted by such a program is informed of the employment-related rights and benefits to which the person is entitled under this section.
- M. **EQUAL TREATMENT FOR FAITH BASED ORGANIZATIONS (29 CFR 2, Subpart D).** Any organization that participates in a program funded by federal financial assistance shall not, in providing services or in outreach activities related to such services, discriminate against a current or prospective program beneficiary on the basis of religion, religious belief, a refusal to hold a religious belief, or a refusal to attend or participate in a religious practice. However, an

organization that participates in a program funded by indirect financial assistance need not modify its program activities to accommodate a beneficiary who chooses to expend the indirect aid on the organization's program.

- N. **PURCHASE OF AMERICAN MADE PRODUCTS (P.L. 103-333 §507).** It is the sense of the Congress that, to the greatest extent practicable, all equipment and products purchased with funds made available under Public Law 103-333 should be American-made. Funds made available under this Public Law may be used to fund Contractor's performance under this Agreement. In providing financial assistance to, or entering into any contract with, any entity using funds made available in this Act, Contractor, to the greatest extent practicable, shall provide to such notice describing the statement made by the Congress, as to American made products.
- O. **PUBLIC ANNOUNCEMENTS AND ADVERTISING (P.L. 103-333 §508).** When issuing statements, press releases, requests for proposals, bid solicitations and other documents describing projects or programs funded in whole or in part with Federal money, all Contractors receiving Federal funds, including but not limited to State and local governments and recipients of Federal research grants, shall clearly state (1) the percentage of the total costs of the program or project which will be financed with Federal money, (2) the dollar amount of Federal funds for the project or program, and (3) percentage and dollar amount of the total costs of the project or program that will be financed by nongovernmental sources.
- P. **CODES OF CONDUCT (29 CFR 95.42).** The Contractor shall maintain written standards of conduct governing the performance of its employees engaged in the award and administration of contracts. No employee, officer, or agent shall participate in the selection, award, or administration of a contract supported by Federal funds if a real or apparent conflict of interest would be involved. Such a conflict would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in the firm selected for an award. The officers, employees, and agents of the Contractor shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors, or parties to sub-agreements. However, Contractor may set standards for situations in which the financial interest is not substantial or the gift is an unsolicited item of nominal value. The standards of conduct shall provide for disciplinary actions to be applied for violations of such standards by officers, employees, or agents of the Contractor.
- Q. **EMPLOYMENT ELIGIBILITY REQUIREMENTS.** Employment of unauthorized aliens by Contractor is considered a violation of the Immigration and Nationality Act. Contractor shall use the U.S. Department of Homeland Security's E-verify system to verify the employment eligibility of all new employees hired by Contractor during the contract term. Contractor shall be responsible for including the provisions of this paragraph in any context with, and requiring compliance by any/all subcontractors performing under this Agreement. If Contractor knowingly employs unauthorized aliens, in violation of this paragraph,, such action shall be cause for unilateral cancellation of this Agreement and PHWB may recover damages from Contractor resulting from such cancellation. Further, PHWB may unilaterally terminate this Agreement, without penalty, if Contractor is determined to have violated a prohibition in this paragraph of this Agreement; or has an employee who is determined by PHWB to have violated a prohibition in

this paragraph of this Agreement through conduct that is either associated with performance of this Agreement or imputed to Contractor using the standards and due process for imputing the conduct of an individual to an organization that are provided in 2 CFR part 180, "OMB Guidelines to Agencies on Government-wide Debarment and Suspension (Non-procurement)," as implemented by PHWB.

R. **ASSURANCES AND CERTIFICATIONS.** The Department of Economic Opportunity (DEO) will not award federal workforce funds where the PHWB or its contractors have failed to complete the ASSURANCES AND CERTIFICATIONS contained in this attachment. In performing its responsibilities under the Master Agreement, the Contractor provides the following certifications and assurances:

1. Assurances – Non-Construction Programs (SF 424 B)
2. Debarment and Suspension Certification (29 CFR Part 98 and 45 CFR Part 74)
3. Certification Regarding Lobbying (29 CFR Part 93 and 45 CFR Part 93)
4. Drug free Workplace Certification (29 CFR Part 98 and 45 CFR Part 82)
5. Nondiscrimination & Equal Opportunity Assurance (29 CFR Part 37 and 45 CFR Part 80)
6. Certification Regarding Environmental Tobacco-Smoke
7. Association of Community Organizations for Reform Now (ACORN) Funding Restriction Assurance (Pub. L 111-117)
8. Scrutinized Companies Lists Certification (Section 287.135.F.S.)

NOTE: Certain of these Assurances may not be applicable to your project or program. If you have questions, please contact the PHWB.

S. **ASSURANCES – NON-CONSTRUCTION PROGRAMS.** As the duly authorized representative of the Contractor, I certify that Contractor:

1. Will give the Department, the Comptroller General of the United States, and if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award, and will establish a proper accounting system in accordance with generally accepted accounting standards or Department directives.
2. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color, or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. 1681-1683, and 1685-1686), which prohibits discrimination on the basis of handicaps; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. 6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255) as amended, relating to nondiscrimination the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention,

Treatment and Rehabilitation Act of 1970 (P.L., 91-616) as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) Sections 523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. 290 dd.3 and 290 cc-3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights act of 1968 (42 U.S.C. 3601 et seq.) as emended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and (j) the requirements of any other non-discrimination statute(s) which may apply to the Agreement.

3. Will comply with the provisions of the Hatch Act (5 U.S.C. 1501-1508 and 7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.
4. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. 276a to 276a7), the Copeland Act (40 U.S.C. 276c and 18 U.S.C. 874), and the Contract Work Hours and Safety Standards Act (40.327-333), regarding labor standards for federally assisted construction sub-agreements.
5. Will comply with environment standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. 1451 et. seq.); (f) conformity of Federal actions to State (Clear Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et. seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205).
6. Will cause to be performed the required financial and compliance audits in accordance with the single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
7. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations and policies governing the programs associated with the Agreement.
8. Will comply with the procurement standards of 2 CFR 200.318 –200.326.

T. CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS – PRIMARY COVERED TRANSACTION. The Contractor certifies to the best of its knowledge and belief, that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by a State or a Federal department or agency;
2. Have not within a three-year period preceding the Agreement been convicted 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 antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

3. Are not presently indicted or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (B)(2) of this certification; and/or
4. Have not within a three-year period preceding the Agreement had one or more public transactions (Federal, State, or local) terminated for cause or default.
5. Have not been placed on the convicted vendor list following a conviction of a public entity crime as set forth in Fla. Stat. 287.133(2)(a).
6. Have not been placed on the discriminatory vendor list described in Section 287.134 Fla. Stat.

U. CERTIFICATION REGARDING LOBBYING – CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS. The Contractor certifies, to the best of its 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 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, an officer or employees of Congress, or employee of a Member of Congress in connection with this Federal 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 that language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants and contracts under grants, loans and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly;
4. 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 31 U.S.C. 1352. 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;
5. Contractor shall not, directly or indirectly, expend either state or federal funds either (i) for the purpose of lobbying any branch, unit or instrumentality of the state or federal governments, or (ii) for any otherwise allowable purpose which could result in unauthorized lobbying.

V. **CERTIFICATION REGARDING DRUG-FREE WORKPLACE REQUIREMENTS.** Pursuant to the Drug-Free Workplace Act of 1988 and its implementing regulations codified at 29 C.F.R. Part 94, the undersigned Contractor, attests and certifies that it will provide a drug-free workplace by the following actions.

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the RWBs' workplace and specifying the actions that will be taken against employees for violation of such prohibition.
2. Establishing an ongoing drug-free awareness program to inform employees concerning:
 - a. The dangers of drug abuse in the workplace;
 - b. The policy of maintaining a drug-free workplace;
 - c. Any available drug counseling, rehabilitation and employee assistance programs;
 - d. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
3. Making it a requirement that each employee to be engaged in the performance of the agreement be given a copy of the statement required by paragraph V.1. of this certification.
4. Notifying the employee in the statement required by paragraph V.1. of this certification that, as a condition of employment under the contract, the employee will:
 - a. Abide by the terms of the statement;
 - b. Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring the workplace no later than five (5) calendar days after such conviction.
5. Notifying the PHWB in writing ten (10) calendar days after receiving notice under subparagraph 4.b. of this Section from an employee or otherwise receiving actual notice of such conviction. Provide such notice of convicted employees, including position title, to every Grant Officer on which Grant activity the convicted employee was working. The notice shall include the identification number(s) of each affected contract/Grant. An Incident Report Form, which can be found on the Department's intranet site, should be completed and submitted to the following address:

Office of the Inspector General
Department of Economic Opportunity
MSC# 130, Caldwell Building
107 East Madison Street
Tallahassee, Florida 32399-4126

6. Taking one of the following actions, within thirty (30) calendar days of receiving notice under subparagraph 4.b., with respect to any employee who is so convicted.

- a. Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973 as amended.
 - b. Requiring such employee to participate satisfactorily in drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State or local, health, law enforcement, or other appropriate agency.
7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of this entire certification.

W. ***NONDISCRIMINATION & EQUAL OPPORTUNITY ASSURANCE.*** As a condition of the Contract the Contractor assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

1. Section 188 of the Workforce Investment Act of 1998 (WIA) which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title IB financially assisted program or activity;
2. Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin;
3. Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities;
4. The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age;
5. Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in education programs; and
6. The American with Disabilities Act of 1990 (Pub. L. 101-336), prohibits discrimination in all employment practices, including, job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities.

The Contractor also assures that it will comply with 29 CFR Part 37 and all other regulations implementing the laws listed above. This assurance applies to the Contractor's operation of the WIA Title I – financially assisted program or activity, and to all agreements the Contractor makes to carry out the WIA Title I – financially assisted program or activity. The Contractor understands that PHWB, DEO and the United States have the right to seek judicial enforcement of the assurance.

X. ***CERTIFICATION REGARDING ENVIRONMENTAL TOBACCO-SMOKE.*** As a condition of the Contractor the Contractor assures that it will comply fully with the certification regarding environmental tobacco-smoke.

The Pro-Children Act of 2001, 42 U.S.C. 7181 through 7184, imposes restrictions on smoking in facilities where Federally-funded children's services are provided. Grants are subject to these requirements only if they meet the Act's specified coverage. The Act specifies that smoking is prohibited in any indoor facility (owned, leased, or contracted for) used for the routine or regular provision of kindergarten, elementary, or secondary education or library services to children under the age of 18. In addition, smoking is prohibited in any indoor facility or portion of a facility (owned, leased, or contracted for) used for the routine or regular provision of federally funded health care, day care, or early childhood development, including Head Start services to children under the age of 18. The statutory prohibition also applies if such facilities are contracted, operated or maintained with Federal funds. The statute does not apply to children's service provided in private residences, facilities funded solely by Medicare or Medicaid funds, portions of facilities used for inpatient drug or alcohol treatment, or facilities where WIC coupons are redeemed. Failure to comply with the provision of the law may result in the imposition of a civil monetary penalty of up to \$1,000 per violation and/or the imposition of an administrative compliance order on the responsible entity.

- Y. **ASSOCIATION OF COMMUNITY ORGANIZATIONS FOR REFORM NOW (ACORN) FUNDING RESTRICTIONS ASSURANCE (Pub. L. 111-117).** As a condition of the Agreement, the Board assures that it will comply fully with the federal funding restrictions pertaining to ACORN and its subsidiaries per the Consolidated Appropriations Act, 2010, Division E, Section 511 (Pub. L. 111-117). The Continuing Appropriations Act, 2011, Sections 101 and 103 (Pub. L. 111-242), provides that appropriations made under Pub. L. 111-117 are available under the conditions provided by Pub. L. 111-117. Note: As of June 20, 2011, this matter is in litigation in the District Court for the Eastern District of New York.
- Z. **SCRUTINIZED COMPANIES LISTS CERTIFICATION, SECTION 287.135, F.S.** If a board that is affiliated with the local governmental entity enters into a contract in the amount of \$1 million or more, in accordance with the requirements of section 287.135, F.S., the Contractor will submit a certification that the contractor is not listed on the Scrutinized Companies that Boycott Israel list, or is engaged in a boycott of Israel, the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, engaged in business operations in Cuba or Syria, or meets the conditions for exemption as provided in section 287.135(4), F.S. Both lists are created pursuant to section 215.473, F.S.
- AA. **PUBLIC RECORDS LAW; SUNSHINE LAW.** Contractor agrees to comply with public records and open meeting requirements as applicable including 2 CFR 200.333, and 2 CFR 200.336.
- BB. **INDIVIDUAL NON-DISCLOSURE AND CONFIDENTIALITY CERTIFICATION.** To the extent any Contractor, or employee of Contractor, is granted authorization to access workforce information systems, including systems containing confidential information, Contractor and its employees are required to complete the established Individual Non-Disclosure and Confidentiality Certification Form upon request.
- CC. **MANDATE TO REPORT ABUSE OF VULNERABLE POPULATIONS.** In compliance with Sections 39.021 and 415.1034 Florida Statutes, if Contractor, and its agents, employees, or others performing services on Contractor's behalf, knows or has reasonable cause to suspect that a child, aged person or disabled adult is or has been abused, neglected, or exploited, Contractor, and its agents, employees and others performing services on Contractor's behalf, agree to immediately report such knowledge or suspicion to the Florida Abuse Hotline by calling

1-800-96ABUSE or via the web reporting option at [http:// www.dcf.state.fl.us/abuse/report](http://www.dcf.state.fl.us/abuse/report) or via fax 1-800-914-0004.

STATUTORY AND NATIONAL POLICY REQUIREMENTS. In compliance with 2 CFR, section 200.300,) a) The Federal awarding agency must manage and administer the Federal award in a manner so as to ensure that Federal funding is expended and associated programs are implemented in full accordance with the U.S. Constitution, Federal Law, and public policy requirements: Including, but not limited to, those protecting free speech, religious liberty, public welfare, the environment, and prohibiting discrimination. The Federal awarding agency must communicate to the non-Federal entity all relevant public policy requirements, including those in general appropriations provisions, and **incorporate them either directly or by reference in the terms and conditions of the Federal award (emphasis added.)** b) The non-Federal entity is responsible for complying with all requirements of the Fed

By signing below, the Contractor certifies and assures that it will fully comply with the applicable assurances outlined above.

Contractor:



Signature

Suzanne Ricci, CEO

Print Name and Title

Appendix 2: References

Proposers shall provide three (3) references for services outlined in this RFP.

Reference #1

Company Name Patriot Talent Solutions
Contact Person Ashley Putnam
Address 5401 W. Kennedy Blvd, Suite 100, Tampa, FL 33609
Phone Number 813-407-1566
Email aputnam@patriottalent.com
Service Dates Employer Partner we have worked with since 2019

Reference #2

Company Name Vology - ATS
Contact Person Joel Morales
Address 15950 Bay Vista Drive, Clearwater, FL 33760
Phone Number 813-728-7910
Email jmorales@atgs.net

Service Dates Joel was a customer of Computer Coach since 2019. He is now an employer partner and community partner as well.

Reference #3

Company Name Citi - Governance and Compliance

Contact Person Elizabeth Donley

Address 3800 Citibank Center, Tampa, FL 33610

Phone Number 813-395-4010

Email edonleypm@gmail.com

Service Dates Elizabeth is a CSPH former customer and a Computer Coach graduate.

As part of the reference check process, PHWB reserves the right to review the specific qualifications and relevant capabilities of all personnel; review licensing; review audits; and contact any individuals, agencies or employers listed in the proposal and/or others who may have experience or knowledge of the bidder's performance and qualifications to do the work.

APPENDIX 3

PROPOSAL EVALUATION FORMS

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: _____

Rater's

Name:

Date: _____

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	<p>Information not provided</p> <p>Addresses mission , views and value</p> <p>Mission, views and values closely related to PHWB's mission and values</p>		
<p>b) Previous specific experience in delivering WIOA and other training services mentioned in RFP</p> <p>Performance results from current or recent contracts</p>	0-20 pts.	<p>No specific experience</p> <p>Experience in 1 or 2 of the listed programs</p> <p>Experience with 3 or more programs</p> <p>Exceptional experience, 5 or more years providing similar services</p> <p>Poor or unrelated performance results</p> <p>Achieved performance standards</p>		

		Exceeded most performance standards		
References	0-15	No references Sufficient references Exceptional references provided		
Percentage of past students who have gained/retained sustainable employment	0-15			
Total Points For This Section				
Budget	Max. 35 pts.			
a) Budget narrative The budget narrative incorporates the following: <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs 	0-10	Requirements not addressed or poorly addressed Requirements addressed Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided		

<ul style="list-style-type: none"> • description of how the organization will support costs until invoices are paid • detail of the proposed method of payment 				
<p>b) Budget costs:</p> <p>Proposed costs are necessary, allowable, reasonable, and properly supported</p> <p>Proposed profit is reasonable</p>	0-15	<p>Proposed costs not adequately supported</p> <p>Adequate justification provided to support costs; proposed costs are necessary and allowable</p> <p>Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable</p>		
<p>c) Administrative and financial management experience and capabilities</p>	0-10	<p>Less than 3 years experience</p> <p>3 to 5 years of experience</p> <p>More than 5 years experience</p>		
Total Points For This Section				

RATING SUMMARY – RFP #

PROPOSER: _____

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	

COMMENTS: _____

Rater's Signature

Date

To Whom It May Concern,

I am writing to highly recommend Computer Coach as a valuable resource for career development and upskilling. As a customer, I was able to utilize the WIOA Training Grant through CareerSource Pasco Hernando to participate in a customized training program with Computer Coach. The program included Project Management, Data Analytics, and Cloud training, which helped me to become more marketable in the job market and advance my career.

The program at Computer Coach was tailored to my specific needs and goals and provided me with the hands-on experience and theoretical knowledge that I needed to excel in my career. The instructors were knowledgeable and approachable, and always available to answer any questions or provide guidance. The program was also flexible and allowed me to learn at my own pace.

Computer Coach not only provided me with excellent training programs but also went the extra mile to help me achieve my career goals. They offered a comprehensive support system that included guidance and resources in my job search. The team was incredibly supportive and helped me in finding the perfect job opportunity that aligns with my skills and goals.

I highly recommend Computer Coach for anyone looking to upskill and advance their career. Their customized training programs, knowledgeable instructors and job search assistance helped me to excel in my field and achieve my professional goals.

Sincerely,
Elizabeth Donley

A handwritten signature in black ink, appearing to read 'Elizabeth Donley', with a stylized, flowing script.

To whom it may concern,

I am writing to highly recommend Computer Coach as a valued community partner. As the Cloud Practice Manager of Vology(ATSG), a technology solutions provider based in Tampa Bay, I have had the pleasure of working closely with Computer Coach over the past several years.

Computer Coach has been a tremendous asset to our community in their efforts to grow the tech talent in Tampa Bay. They have worked to provide training and education opportunities to individuals and groups, including underrepresented communities, to help bridge the digital divide and increase access to technology, as well as through innovative partnerships with organizations in Tampa Bay.

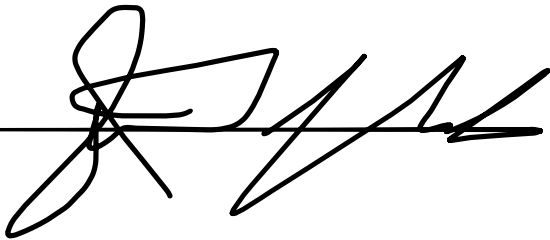
Their dedication and commitment to their mission is evident in the success of their programs. They have helped individuals develop the skills they need to succeed in the tech industry, and in turn, have helped drive the growth and success of our region's economy.

In addition to their technical expertise, Computer Coach is a pleasure to work with. They are always professional, responsive, and easy to communicate with. They are also a great collaborator and have worked with us on multiple projects to help our community.

I cannot recommend Computer Coach highly enough as a community partner. They have consistently demonstrated their commitment to making a positive impact in our community, and I am confident that they will continue to do so.

Please do not hesitate to contact me if you have any questions or need further information.

Sincerely,
Joel Morales
Cloud Practice Manager, Vology(ATSG)
Tampa Bay

A handwritten signature in black ink, appearing to read 'Joel Morales', is written over a horizontal line. The signature is stylized with loops and sharp angles.

To whom it may concern,

I am writing to highly recommend Computer Coach as an innovative ally in the Tampa Bay tech workforce development ecosystem. As the Director of Business Development at Patriot Talent Solutions, a workforce development and talent acquisition firm based in Tampa Bay, I have had the pleasure of working closely with Computer Coach on several initiatives.


Computer Coach has been an invaluable partner in our efforts to bring tech talent and organizations together. They have a deep understanding of the local tech ecosystem and consistently go above and beyond to help bridge the gap between job seekers and employers. Their programs and initiatives are designed to provide individuals with the training and education they need to succeed in the tech industry, while also helping organizations access the talent they need to grow and succeed.

Our most recent collaboration was the launch of our Leadership Social Series, where we bring local tech leaders together to collaborate and ensure that Tampa Bay remains the most innovative tech community. Computer Coach played a key role in making this initiative a success, by providing valuable insights and expertise in making this collaboration possible.

I cannot recommend Computer Coach highly enough as a partner for your organization. They have consistently demonstrated their commitment to making a positive impact in our community and I am confident that they will do the same for yours.

Please do not hesitate to contact me if you have any questions or need further information.

Sincerely,
Ashley Putnam
Director of Business Development, Patriot Talent Solutions
Tampa Bay


[Ashley Putnam \(Jan 25, 2023 21:16 EST\)](#)

To Whom It May Concern,

I am writing to highly recommend Computer Coach for anyone looking to upskill and advance their career. I had the pleasure of working with Computer Coach as a customer, and I can confidently say that their programs and services are top-notch.

I utilized the WIOA Training Grant through CareerSource Pasco Hernando to participate in Computer Coach's robust program, which included Project Management, Digital Marketing, and Adobe Training. These courses were not only informative and well-structured, but they also provided hands-on experience that I could apply to my job search and career.

I found the program to be challenging and engaging, and the instructors were knowledgeable and supportive. They were always available to answer any questions and provide guidance.

Computer Coach also helped me with my job search and overall career success. They provided me with tips and resources to help me stand out to potential employers and assisted me in finding the right opportunity for me.

In conclusion, I highly recommend Computer Coach for anyone looking to upskill and advance their career. They offer high-quality programs and services that are tailored to meet the needs of their customers. Their team is knowledgeable, supportive, and dedicated to helping their customers achieve their goals.

Sincerely,

Jean McDermott

A handwritten signature in cursive script that reads "Jean McDermott".

PASCO-HERNANDO WORKFORCE BOARD, INC.

Proposal Cover sheet

Submitted in response to RFP #

NAME OF PROPOSING AGENCY: FleetForce Truck Driving School

ADDRESS: 8437 Tuttle Avenue #345
Sarasota, FL 34243

TELEPHONE NUMBER: 601-408-1247

FAX NUMBER: N/A

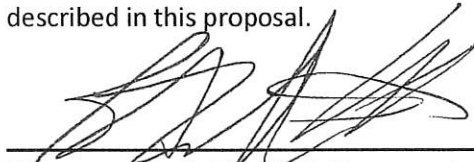
EMAIL ADDRESS: tra@drivefleetforce.com

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

Tra Williams, Owner and President

FleetForce Truck Driving School

I do hereby certify that this proposal is submitted in accordance with the provisions and conditions outlined in RFP # 01-01042023 WIOA AD/DW_WT, 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

1-18-23
Date

Tra Williams, President/Owner

Typed name and Title

FleetForce Truck Driving School is a current WIOA Training Provider and understands the demographics we serve. Individuals need high quality, cost-effective training, close to home. Our recruitment team at FleetForce currently provides WIOA pre-screening and referrals to numerous partnering Career Sources throughout Florida. We understand the need and value the partnership to provide training to individuals who do not have the funds to pay out of pocket. FleetForce Truck Driving School serves individuals who wish to start a career in the trucking industry and employers who need to recruit, train, and retain drivers to keep the economy rolling.

At FleetForce Truck Driving School, our core values not only define our management structure but also serve as a constant reinforcer to encourage staff to provide the highest level of customer service and quality training possible. The core values at FleetForce are gratitude, resourceful, exemplary, accountability, simplicity, and empathy. We instill these values not only in our training team, but also in our students. It is our mission to provide explementary technical training but also empower aspiring drivers with work readiness traits that ensure our graduates are top applicants.

FleetForce (FF) currently offers commercial truck driving training at four locations throughout Florida (Winter Haven, Venice, Bradenton, and Palm City). Through the CDL Consortium with eight Florida College System colleges, FleetForce will be offering training opportunities at eight new college campus-based locations in 2023. FleetForce is the training fulfillment partner with Pasco-Hernando State College to offer CDL training on campus. While FleetForce is currently a WIOA training provider for Pasco-Hernando residents, offering training within the two-county region will make training accessible for many individuals unable to drive to neighboring training locations. In addition to Pasco Hernando State College, FleetForce has strong existing collaborations with State College of Florida, Manatee-Sarasota, Broward College, Daytona State College, and Northwest Florida College. In March, FleetForce will be adding Pasco-Hernando State College as a location for campus-based CDL training. This additional site will eliminate barriers for training resulting in gainful employment.

Per the Department of Economic Opportunity, GAP Analysis of Workforce Region 16 Occupations, 3,847 jobs currently remain unfilled for heavy and tractor truck drivers and industrial truck/tractor operators. In addition, job projections indicate a 12% profession growth over the next seven years (2030). For the Workforce Region to provide a labor force for this immediate need, and planning for future growth, having training opportunities inside the service area are essential. This training proposal addresses the lack of commercial driving training within Pasco-Hernando counties by offering an innovative public-private collaboration involving Career Source Pasco-Hernando, FleetForce Truck Driving School, and Pasco Hernando State College.



WIOA-WTP Short Term Training
Request for Funds Proposal

Table of Contents

- A. Proposal Narrative:
 - a. Organizational Experience and Capabilities
 - b. Specific Experience in Managing and Delivering CDL Training
 - c. CDL Measurable Performance Outcomes
 - d. Financial and Administrative Experience
 - e. Staff Associated with Short-Term Training Project
- B. Service Strategy
 - a. Pasco and Hernando Counties and Local Labor Market
 - b. Short-Term Training Project Staffing Plan
 - c. Scope of Work Services
 - d. Continuous Improvement Process for Project Reporting
 - e. Innovative Delivery Method and Public/Private Collaboration
- C. Budget:
 - a. Budget Narrative
 - b. Cost Allocation Method
 - c. In-Kind Resources/Support for Short-Term Training Program
 - d. Contingency Plans
 - e. Ongoing Training
 - f. Method of Payment Requested
 - g. Budget Maximization
- D. Why FleetForce Truck Driving School?
- E. Pasco Hernando State College Letter of Support

Appendix 1: Required Forms, Documentation and Certification

Appendix 2: References and FleetForce Job Descriptions

A. Proposal Narrative:

a. Organizational Experience and Capabilities:

Trucking is a central part of growing and maintaining a strong economy, but it's also a life-changing career opportunity for so many people. FleetForce Truck Driving School (FleetForce) is the fastest-growing CDL school in Florida. We empower drivers, strengthen companies, and build communities—that is our mission. FleetForce delivers industry-leading commercial driver's training. Our graduates are skilled, engaged, and passionate about their new careers. Florida currently has an excess of 35,000 unfilled jobs within the trucking industry. In Hernando and Pasco Counties, the Department of Economic Opportunity reported in 2022, an astounding 2,858 heavy and tractor trailer job openings with an additional 962 industrial truck and tractor openings, which equates to a total of 3,847 trucking positions unfilled. Professional drivers are the backbone of this state and our country. They keep our shelves stocked, our tanks full, and our economy moving.

FleetForce is different from other truck-driving schools. At FleetForce, we are a family. Our students are not just our customers, they are part of our legacy. They have trusted us to provide them with high-quality training, industry-leading expertise, and job placement assistance. Our recruitment and training team takes that trust very seriously. We care about quality. Our programs are designed to meet the needs of those we serve. Whether it is a private business, a city government, or an aspiring driver ready for a new career, we never sacrifice our standards. Our corporate partners consistently rate our drivers higher than those who trained elsewhere. We are the best in our class! Exemplary is a core value at FleetForce, and our definition of being exemplary is providing constant improvement through humility. No matter how good we are, we know we can always be better. To achieve that, we focus on innovation and optimization as we expand throughout Florida. We care about our drivers. Our connection with our students runs so deep, that many of our former students have returned to FleetForce to become instructors. We think this is the highest honor they can pay us. We take our core values very seriously and are grateful to find others who share them.

Program Goals:

- Increase awareness of the trucking profession and existing jobs through intensive outreach, marketing, and career counseling.
- Provide eligible individuals with commercial driver's training to complete their CDL licensure.
- Assist program completers in finding employment with earnings that allow them to become self-sufficient.
- Provide strategies for job retention and career pathway opportunities for commercial drivers.

Though the Pasco Hernando Workforce Region currently has an extremely low unemployment rate of 2.9%, this does not mean there is a lack of interest in individuals wanting to receive short-term training for upskilled employment opportunities. We, as training providers, must ensure a skilled workforce is ready to meet the needs of local employers, as well as address the current pent-up demand for drivers. The equation must balance to ensure employers have drivers, while also providing the training opportunity for the individuals who need it the most. FleetForce is a current WIOA Training Provider and understands the demographics we serve. Individuals need high-quality, cost-effective training close to home. Our recruitment team at FleetForce currently provides WIOA pre-screening and referrals to numerous partnering CareerSource locations throughout Florida. We understand the need and value of the partnership to provide training to individuals who do not have the funds to pay out of pocket. FleetForce serves both individuals who wish to start a career in the trucking industry and employers who need to recruit, train, and retain drivers to keep the economy rolling.

At FleetForce, our core values not only define our management structure but also serve as a reinforcer to encourage our staff to provide the highest level of customer service and quality training possible. The core values at FleetForce are gratitude, resourcefulness, exemplary, accountability, simplicity, and empathy. We instill these values not only in our training team but also in our students. It is our mission to provide elementary technical training but also empower them with work readiness traits that make our graduates highly sought-after applicants.

FleetForce currently offers commercial truck driving training at four locations throughout Florida (Winter Haven, Venice, Bradenton, and Palm City). Through the CDL Consortium with Florida College System colleges, FleetForce will be offering training opportunities at eight new college campus-based locations in 2023. FleetForce is the training fulfillment partner with Pasco-Hernando State College (PHSC) to offer CDL training on campus. While FleetForce is currently a WIOA training provider for Pasco-Hernando residents, offering training within the two-county region will make training truly accessible for many individuals unable to drive to neighboring training locations. FleetForce has strong existing collaborations with SCF; Broward College; Daytona State College; PHSC; Central Florida; and Northwest Florida College. In March, FleetForce will begin offering classes at the West Campus of PHSC for campus-based training. This addition will maximize the return for not only the individuals requiring the training but the employers needing the workers. Having FleetForce on the PHSC campus will be a *'workforce win'* for all involved, including CareerSource Pasco Hernando.

Another strength that sets FleetForce apart from other truck driving schools is our desire to train every individual who wants an opportunity to possess a job in the trucking industry. One example is the Florida HIRES (Helping Inmates Realize Employment Success) program, which is provided in partnership with CareerSource Central Florida, CareerSource Polk, and FleetForce. Florida HIRES introduced this first-of-its-kind commercial driver's license (CDL B) training and

enhanced employability program at the FDC Kissimmee Community Release Center in 2021. Participants are generally 60-180 days from full release and are among select inmates who are eligible for paid employment in the community while completing their sentence. To date, 30 individuals have completed the Florida HIRES CDL program. FleetForce believes being part of the solution means businesses can continue to do what they need to get products to Florida consumers.

As reported at the December Pasco Hernando Workforce Board Meeting, per the Department of Economic Opportunity GAP Analysis of Workforce Region 16 Occupations, **3,847** jobs remain unfilled for heavy and tractor truck drivers and industrial truck/tractor operators. Job projections indicate a **12%** growth in the profession over the next seven years (2030). For the Workforce Region to provide a labor force for this immediate need, and plan for future growth, having training opportunities inside the service area is essential. This training proposal remedies the lack of commercial driving training within Pasco-Hernando counties.

b. Specific Experience in Managing and Delivering CDL Training:

FleetForce has produced the highest quality professional drivers since 1981. FleetForce has a rich history of providing high-quality, cost-effective commercial driver training at our Winter Haven location. FleetForce is licensed by the Florida Department of Education and the Independent Education Committee to provide truck training in Florida. In addition, FleetForce is certified by the Florida High Safety and Motor Vehicles Department for third-party testing.

In 2020, FleetForce partnered with Armellini Logistics in Palm City to provide training onsite to help ensure a full line of transportation and logistics services. In 2021, FleetForce expanded its training collaboration by partnering with State College of Florida, Manatee-Sarasota (SCF) to offer CDL training at their Bradenton and Venice campus locations. To address the statewide demand of over 200,000 current job openings, throughout 2023, FleetForce will expand our footprint by partnering with eight additional state colleges to offer onsite campus training. In partnership with PHSC's Career and Job Training Division, FleetForce will offer CDL training on the West Campus located in New Port Richey. FleetForce is the fastest-growing CDL school in Florida. Not only do we provide the highest level of training, but we also see the urgency of increasing the number of new and innovative locations to guarantee available training opportunities. The purpose of short-term workforce training is to provide affordable instruction, close to home, that results in a self-sustaining waged job. Commercial driver's training and licensure do just that.

In 2021, FleetForce launched a new driver program in collaboration with Florida Trucking Association (FTA). FleetForce's Pre-Hire Training Program works diligently to partner our committed employers with eager, qualified trucking school candidates. Our network of potential employers provides CDL scholarships to qualified students who commit one full year of service to their company post-graduation, ensuring a guaranteed position while paving the way for a life-long career skillset. Qualified candidates receive hours of dedicated hands-on

training from our licensed instructors while potential employers cover the upfront costs, so aspiring drivers can focus on becoming the best driver they can be. In addition to tuition costs, in some cases, once the candidate obtains the CDL he or she will receive a sign-on bonus, and some students will begin receiving a paycheck from the company while they obtain training. The driver shortage limits the capacity of trucking companies and directly impacts the economy and Floridians' daily lives. This collaboration matches some of the most well-respected companies in the state with well-trained drivers eager to get on the road. FleetForce specializes in developing and implementing customized training programs to fulfill the needs of companies looking to aggressively expand. Every program is unique. Therefore, at FleetForce we tailor our program to train drivers who will add value to companies for many years to come.

c. CDL Measurable Performance Outcomes:

In early 2021, to help address the local workforce demand for commercial drivers, FleetForce partnered with SCF to offer the Entry Level Driver Training program on their Bradenton campus. Within the first year of this public-private partnership, more than 100 individuals received their Class A or B driver's license. Quickly in 2021, recognizing the demand for additional drivers, FleetForce and SCF expanded their collaboration by offering training at a second campus location in Venice. The goals of this first-in-the-state public-private partnership were to 1) promote awareness of the expanding transportation industry, 2) deliver highly skilled, yet affordable training for individuals looking for a career in an expanding sector, and 3) provide area businesses with well-trained, ready-to-work applicants wanting to remain in the service region area.

More recently in September of 2022, Governor DeSantis awarded Florida's Job Growth Grant which provided \$8.2 million dollars to Broward College to increase the number of CDL training programs throughout Florida. FleetForce became the fulfillment partner to offer the training funded by this job growth grant. This resulted in the creation of the first-ever CDL Consortium, which partnered FleetForce with eight other state colleges. Additionally, FleetForce is the first and only Department of Labor Registered CDL Apprenticeship Program in the State of Florida. The CDL Apprenticeship program provides 2,000 hours of training and career pathway development to apprentices. FleetForce serves as a corporate partner for Domino's, Publix Distribution Center, and Armellini Logistics to provide CDL training for their existing employees.

Measurable Performance Outcomes:

Partnering Program	Program Goals	Performance Achievement Data	Contact Person
Career Source Florida, Florida Department of Corrections, Florida HIRES (<i>Helping Inmates Realize Employment Success</i>), and FleetForce Truck Driving School.	Train 30 inmates 60-180 days prior to release to earn their commercial driver's license.	To date, 30 inmates have earned their CDL.	Colleen Englert, Florida HIRES cenglert@floridareadytowork.com
State College of Florida, Manatee-Sarasota Governors Emergency Response Grant (GEER), and FleetForce Truck Driving School	Train 48 individuals over a 12-month timespan.	63 individuals earned their CDL licenses.	Dr. Todd Fritch, Executive Vice President and Provost, State College of Florida-Manatee Sarasota, fritch@scf.edu
CareerSource Suncoast and FleetForce Truck Driving School	Provide CDL training for WIOA-eligible and approved individuals.	93% Graduation Rate 78% Placement Rate \$25.00 Average Hourly Wage	Josh Matlock, Chief Executive Officer, CareerSource Suncoast, jmatlock@careersourcesc.com
CareerSource Polk and FleetForce Truck Driving School	Provide CDL training for WIOA-eligible and approved individuals.	100% Graduation Rate 88% Placement Rate \$22.00 Average Hourly Wage	Stacy Campbell-Domineck, Chief Executive Officer, CareerSource Polk, stacy.campbell-domineck@careersourcepolk.com

d. Financial and Administrative Experience:

In 2020, B-3-1, LLC comprised of Tra Williams, and a group of private investors. They acquired the National Business Institute of Florida, Inc. (aka NBI Truck Driver Training), which had been providing career training in a variety of fields for more than 30 years. NBI Truck Driver Training

was rebranded as FleetForce and poised to serve the enormous pent-up demand for licensed commercial drivers and heavy equipment operators. Today, we are the fastest-growing truck driving school not only in Florida but in the nation, training more than 40 aspiring drivers each day to earn their CDL licenses. Since our inception, we have proudly trained more than 20,000 drivers throughout the State of Florida.

FleetForce has a committed accounting team that handles multi-funded programs within our four training locations. FleetForce is an authorized WIOA training partner on eight Career Source locations and manages WIOA training by utilizing the ITA voucher reimbursement system. FleetForce offers an employer pre-hire program that matches qualified aspiring drivers with potential employers who provide a scholarship to obtain a CDL at no cost to the student. FleetForce also has been the sub-grantee on several Florida Department of Education and Florida Department of Economic Opportunity Grants that provide training tuition dollars to eligible aspiring drivers in collaboration with the Florida College System partnering schools. We understand the importance of being good financial stewards by braiding funds with ensuring accountability and high-quality business services.

Breanna Cardozo serves as the Director of Accounting for FleetForce. This role will be responsible for the fiscal management of the grant. Other job duties include developing, implementing, and maintaining accounting policies and procedures. This includes regular reviews and improvements of all internal financial processes, as well as preparing and organizing all financial statements on a regular basis. Budgeting and planning of all company expenditures also fall under her purview. Breanna is responsible for hiring, training, and leading the accounting department to succeed in reaching the company's financial goals.

FleetForce serves as a fulfillment partner with eight state colleges maintaining timely and accurate data for processing training expenses and reporting data to the required parties (IE: FLDOE, FLDEO, CareerSource Florida). FleetForce is currently an ETPL training provider with eight CareerSource Florida locations understanding and implementing the WIOA voucher system for training cost reimbursement.

As the need for commercial drivers continues to rise, FleetForce has a continuous improvement plan to assess the current pent-up demand for CDL. Understanding the main problem is the lack of available training opportunities throughout Florida. FleetForce partners with existing public education institutions to help address the labor shortage and work towards a shared goal and responsibility of having a well-trained and ready labor force. Partnering with public education institutions and workforce development agencies not only provides a strategy to increase the number of individuals who receive training, it also provides cost-effectiveness by eliminating duplication of services. Our continuous improvement model is another way we strive to reduce barriers to training; thus, resulting in more people becoming gainfully employed.

e. Staff Associated with Short-Term Training Project:

As part of our family approach, an aspiring driver will work with several members of the FleetForce team from the time of recruitment to job placement. An existing FleetForce Recruiter will provide day-to-day outreach for this short-term training program. The recruiter will be responsible for outreach and recruitment opportunities throughout the service region to ensure community awareness of the training opportunity. Outreach efforts could be, but are not limited to, printed materials, social media campaigns, job fair booths, and speaking engagements. An existing FleetForce Student Services Coordinator will provide assessments to individuals interested in pursuing a job in the trucking profession. This assessment will include career planning and counseling to ensure the individual understands the profession, training requirements and prerequisites (drug screen, physical, and DOT permit) required. Then the student is ready to transition to the instructional team for training and licensure. The student will work with the Academic Partnerships Coordinator upon licensure completion for job placement assistance. Once the trainee has successfully completed their training and received their commercial driver's license, the academic partnerships coordinator will maintain contact with the individual for a minimum of 12 months.

Sheri Neff serves as the Senior Director of Operations for FleetForce. Sheri is responsible for overseeing all instructional staff, which consists of regional managers, lead instructors, and student services personnel. Sheri has 30+ years of experience in the trucking profession. Sheri was employed with Florida Highway Safety Motor Vehicles (FLHSMV) from 1990-2021. Upon her retirement in 2021, she served as the CDL Compliance Officer. Sheri brings to FleetForce over 30 years of FLHSMV experience in her previous roles as office manager, test examiner, tax collector clerk, motorcycle examiner, DUI hearing officer, and quality assurance oversight.

Darren Brock serves as the Senior Director of Business Development. He has over 20 years of experience in the retail and call center service industries. He will work with the recruiter to ensure extensive outreach efforts are being made. In addition, he will work with the business development team to increase employer engagement. He understands the importance of creating and training effective teams to become high performing, engaged, and active during recruitment, enrollment, and retention efforts. Through his successful leadership, he has been integral in achieving aggressive student enrollment targets and increasing employer training engagement.

B: Service Strategy:

a. Pasco and Hernando Counties and Local Labor Market:

Based on 2019 Census Bureau data, Hernando County has 202,554 residents yielding a 12.2% population increase since 2010. Of this population, 50% are persons between 19 and 64 years of age who are considered could be in the workforce. Of the population, 51.8% are females.

Pasco County has 553,947 residents yielding a 19.2% population increase since 2010. Of this population, 53% are persons between 19 and 64 years of age who could be in the workforce. Like Hernando County, 51.4% are females. Pasco County has 204,198 households with an average of 2.53 persons per house. Hernando County is smaller with 75,348 households with an average of 2.44 persons per house. Both counties report 87% or more hold a high school diploma or higher. The median annual household income between both counties is \$50,820. With 12% of persons living in poverty, this percentage is most likely higher since the Census Bureau data is four years old. Analyzing the available people in the workforce, along with their educational background and current household income, strengthens the need for this training opportunity to provide another high waged, in-demand profession as an option for residents.

Per 2018 data, there are 3,366 employer establishments in Hernando County and 9,930 within Pasco County. Both counties reported a 6% labor increase in the 2019 Census Bureau data. Realizing this percentage is far greater now, both counties reported more than 350 companies that rely on transportation and logistics services. Therefore, CDL training is vital to guarantee local employers can continue to do business.

b. Short-Term Training Project Staffing Plan:

Quality participant service is dependent on quality staff and continuous staff training to ensure consistent, high-level service delivery. FleetForce will ensure instructional and support staff who are working within this contract are provided the necessary sufficient training to successfully complete their duties as assigned. FleetForce shall advise the CareerSource Pasco Hernando President/CEO on all vacancies and agrees to post all openings on Employ Florida Marketplace. FleetForce shall provide a list of all current staff members for 2023 by the start of the training program.

Tra Williams is the Owner and President of FleetForce. In 2020, B-3-1, LLC comprised of Tra Williams, and a group of private investors who acquired The National Business Institute of Florida, Inc. (aka NBI Truck Driver Training), which had been providing career training in a variety of fields for more than 30 years. NBI Truck Driver Training was rebranded as FleetForce. Tra Williams serves as President of FleetForce. In 2021, Tra was appointed by Governor DeSantis to serve on the Commission for Independent Education. Tra serves as President of daily operations and the four listed director positions listed below report to him.

The management structure includes four director positions reporting directly to the owner/president.

- Senior Director of Operations
 - Responsibilities include but are not limited to Regional Operations, Fleet Maintenance, Testing, and Compliance.

- Senior Director of Business Development
 - Responsibilities include but are not limited to Regional Recruitment, Marketing, the Employer Pre-Hire Program, and Corporate Partners.
- Director of Accounting
 - Responsibilities include but are not limited to Accounts Receivable, Accounts Payable, and Human Resources.
- Director of Corporate Development
 - Responsibilities include but are not limited to Affairs, Apprenticeship Programs, Training Partners, Association/Press, and Philanthropy.

c. Scope of Work Services:

Trucking is a critical part of growing and maintaining a strong economy, as well as providing a life-changing career opportunity for individuals needing to upskill or re-career. FleetForce is a current ETPL training provider for CareerSource Pasco Hernando and understands the significance of providing funding to WIOA/WTP-eligible participants. While we value our current referral relationship through the WIOA ETPL process, this funding increases the '*skin in the game*' approach by allocating set funds for CDL training. This program would allow for CDL training to occur within the CareerSource Pasco Hernando service region. FleetForce will work closely with the Division of Career and Job Training at PHSC to provide recruitment, referral, and wrap-around services to ensure interested and qualifying individuals have this training opportunity. This funding would allow for tuition assistance for individuals to train on the campus of PHSC located in New Port Richey. This would eliminate the current barrier of training not occurring within the workforce region. Individuals are interested in earning their CDL license. However, they are unable to commute to existing neighboring training locations in Winter Haven or Bradenton. Data from the Department of Economic Opportunity (DEO) strongly supports the need for training within the service region. As stated earlier, DEO reports in 2022 there were 2,858 heavy and tractor trailer job openings with an additional 962 industrial truck and tractor openings. This totals 3,847 unfilled jobs and does not plan for the anticipated professional growth of 12% for the area.

Through this funding proposal, FleetForce will offer 83 training scholarships for individuals to earn their commercial driver's licenses. Knowing the demand within the workforce region is not only for heavy and tractor trailer drivers but also industrial and delivery drivers, FleetForce will provide additional add-on certification opportunities for Hazmat and Passenger Endorsements. Area school districts will benefit from this training opportunity, as the need for school bus drivers is dire. Beginning in March 2023, FleetForce will offer CDL cohorts for screened and approved applicants to complete the 200-hour (4-week) Entry Level Driver Training (ELDT) resulting in 83 individuals receiving training from this program.

Detailed Scope of Services:

Outreach and Recruitment:

FleetForce has recruiters on staff to ensure individuals are aware of the trucking profession, growing demand, and training opportunities available. A designated recruiter and student services coordinator will be assigned to this project to assist applicants with recruitment, assessment, training, job placement, and follow-up services. The FleetForce recruiter will take the lead on outreach and program recruitment. However, we know it is vital to leverage our partnership with other workforce practitioners to ensure a seamless pipeline from outreach to employment. FleetForce, CareerSource Pasco Hernando, and PHSC will work together to ensure recruitment efforts occur throughout Pasco and Hernando Counties. In addition, FF has strong partnerships with local technical colleges. FleetForce will provide recruitment to technical college graduates on the benefits of stacking a commercial license with their career certificate, especially in the industrial trade professions. With FleetForce being the fulfillment partner to Pasco Hernando State College, PHSC will promote the CDL program through the Career and Job Training Division. FleetForce will promote this program through workforce organizations and community agencies focusing on reskilling or upskilling economically disadvantaged individuals. FleetForce works closely with local veterans to not only provide training opportunities but funding as well. FleetForce provides individuals with the resources to help transition into civilian life. The Florida Bureau of State Approving Agency has approved FleetForce for veterans' training. FleetForce will leverage our existing collaboration with PHSC to utilize their Veterans Affairs office and personnel to provide targeted outreach to Veterans and their families. Lastly, FleetForce is an active member of the Florida Trucking Association (FTA). We will leverage our FTA relationship to make certain other FTA members (trucking carriers) are aware of this training opportunity.

FleetForce will provide recruitment and community awareness events in partnership with outside organizations to offer maximum student reach. FleetForce, PHSC, and CareerSource Pasco Hernando have an existing relationship in place to assist individuals who are economically disadvantaged, differently abled, homeless, or experiencing substance abuse. Having both public and private partners advocating for this training opportunity will help maximize our reach within Pasco and Hernando Counties. It is FleetForce's highest priority to provide training to these individuals ensuring opportunities for individuals to secure a self-sustaining waged job.

The current industry gender breakdown for our service region indicates 77.5% are males, leaving only 22.5% females. On staff with FleetForce are female instructors and program directors with over 50 years of combined experience in the trucking profession. Having subject matter experts and gender minorities on staff provides a level of assurance and experience to interested individuals. The race/ethnicity breakdown at FleetForce shows a strong representation of White, Hispanic or Latino, and Black or African American employees. FleetForce provides targeted outreach and recruitment to a racially diverse community

ensuring equal access opportunities for all. The Pasco Hernando service region has a higher-than-expected industry age breakdown of 55+ individuals. This age demographic sits at 20.5% within the 18-65+ breakdown. The second highest age demographic is 45-55, increasing the demand to recruit, train, and retain younger individuals. Currently, only 5.9% of people employed within the truck transportation sector are 19-24 years of age. This further demonstrates the need for a training pipeline as the 55+ demographic begins to retire.

Orientation, Intake, and Assessment: FleetForce has dedicated, courteous, and professional staff available to provide one-on-one services to students and corporate partners. FleetForce has core values yielding high numbers for recruiting individuals. We understand the vision of the Pasco-Hernando Workforce Board, Inc. is *"to serve as a catalyst in the community for promoting self-sufficiency through the development of a quality workforce."* Our personal approach, high-quality training, and subject matter experts position us to act as the CDL fulfillment partner to ensure Pasco-Hernando Workforce Board continues being a catalyst for workforce training. Our personal approach guarantees FleetForce recruitment and instructional staff are dedicated to meeting the needs of each student. Our quality educational model provides high-stakes training designed to improve the overall quality of today's workforce and increase the number of trained, ready-to-work individuals to fill vacancies in the service region. Our subject matter experts within our recruitment staff and instructional trainers provide an unmatched level of knowledge, professionalism, and ethics to ensure each student has the experience they deserve.

FleetForce will assign an existing recruiter dedicated to helping individuals enroll in the short-term training CDL program. This person will focus 100% of their efforts on program execution. Participants will attend an individual orientation with the recruiter, which will introduce them to the trucking profession and CDL program. This orientation will also focus on program prerequisites, training requirements, expectations, and the participant's responsibilities.

All trainees must meet the minimum WIOA and/or WTP guidelines for the FleetForce Entry Level Driving Training Program. Admission requirements include the following: a completed signed and dated application and an interview with the FleetForce Recruiter or Student Services Coordinator. In addition, the aspiring driver must be 18 years of age or older and possess a current, valid driver's license, and acceptable Motor Vehicle Report (MVR) and must pass a Department of Transportation (DOT) physical exam and drug screen.

Participants will attend an individual orientation with the Student Services Coordinator, which will introduce them to the trucking profession and CDL training program. This orientation will also focus on program prerequisites, training requirements, expectations, and the participant's responsibilities. All participants must meet WIOA eligibility as deemed by Pasco Hernando Career Source staff.

Individual Employment Plan (IEP): The student services coordinator will initiate the development of an IEP during the CDL Orientation. The participant and FleetForce staff, as well

as any other CareerSource Pasco Hernando designee, will jointly plan for the short-term goals of the participant. This plan will address both training and job placement opportunities. This plan will be reviewed and modified, if necessary, throughout the training process.

Industry Immersion/Job Search Training: For the individuals who need to understand the trucking profession, and available jobs, the student services coordinator shall provide resources on training and career pathway opportunities to the CareerSource Agency Workshops as needed.

Employment Placement: After the individual secures his/her CDL licensure, the academic partnership coordinator will provide job search and job development assistance. The academic partnership coordinator will supervise the participants in their job search along with tracking the participant's progress toward obtaining gainful employment. In addition, they will also monitor the participants during their employment as part of these activities. Placement will be obtained within 90 days of the training completion unless extraordinary circumstances are preventing placement, in which the recruiter/coordinator will notate the circumstance.

Job development strategies will concentrate on securing employers who offer medical insurance and other benefits for workers. The goal is to place program completers in trucking jobs that have the potential for growth and permanency, to recruit employers who provide workers with stepladder increases or promotion opportunities, and to customize employment opportunities for participants who have specific skills or educational qualifications. The business development team will assist to prepare referrals for CDL job openings, which may come from the CareerSource job bank listings, and assist the participant in contacting the employer.

Job Retention: The academic partnership coordinator will provide follow-along services to ensure the participant is still on the job and will allow an opportunity to determine if the participant is meeting their obligations within the workplace.

d. Continuous Improvement Process for Project Reporting:

FleetForce personnel will work alongside CareerSource Pasco Hernando staff to understand all data collection, reporting, analysis, and corrective action mechanisms already in place to ensure performance goals are met. When needed, FleetForce personnel could be onsite, if necessary, at any of the CareerSource locations within the service area ensuring continuous communication amongst interested participants and workforce board staff. FleetForce will use best practices from existing reporting mechanisms already in place within CareerSource Pasco Hernando.

e. Innovative Delivery Method and Public/Private Collaboration:

The critical need to hire and train commercial truck drivers is higher now more than ever. With a national and state decrease in available truck drivers, employers are looking for individuals to hire and train to fill the void. There are 114,810 trucking companies located in Florida. Primarily small, locally owned businesses, they serve a wide range of supporting businesses. Specific to Workforce Development Region 16 area, there are more than 3,000 businesses that rely on trucking companies for consumer transport. Throughout Florida, over 84.9% of all communities depend completely on trucks to move their goods. Per FLDEO Employment Projection Data for 2022-2023, Pasco and Hernando Counties are expected to see a 12-14% increase in trucking-related jobs. Until training is provided in this region, we will be unable to meet the immediate demands of this industry, and the forecasted job growth will certainly halt goods from being transported.

As described in Section B, Question 3, there is an avid skilled labor shortage nationally, statewide, and locally. This training proposal will provide individuals throughout Workforce Region 16 with the competencies needed to gain and retain employment associated with the trucking industry. As seen nationally and throughout Florida, a 'mass exit' of truck drivers occurred throughout the COVID pandemic. Not only does trucking play a key role in the global supply chain, but it is also responsible for transporting over 72% of the freight in the U.S. An aging workforce (20% of all Americans will be 65 or older by 2030) and increase in early retirements triggered by the pandemic, are likely the main reasons behind the shortage. In addition, the baby boomers are retiring at a higher than anticipated rate, while Florida continues to be the fastest-growing state in the nation. The result is an increased number of job vacancies and the need for additional training locations. This proposal provides an innovative method of partnering with the local state colleges by leveraging existing resources to offer CDL training nearby to the individuals who need it.

This proposal will allow 83 individuals to receive pre-training services from a FleetForce representative. Pre-training services could include but are not limited to recruitment, intake, assessment, career counseling, and financial assistance. Once pre-training services are completed, the individual will receive four weeks of CDL training. Individuals will co-enroll in FleetForce and PHSC's Job and Career Training as non-credit students. This co-enrollment provides students the opportunity to earn stackable credentials in addition to their CDL licensure. Non-credit, workforce credentials delivered through PHSC's Job and Career Training could include but are not limited to OSHA 10, Forklift Operator, CPR, or Supply Chain Management. The cost of the additional credentials is not included in this RFP.

To guarantee the mission of '*short-term, readily available training*,' each week a new CDL cohort would begin. The Entry Level Driver Training (ELDT) will be delivered in the face-to-face training component onsite at the New Port Richey location. The formal instruction material is provided by a FleetForce licensed instructor using state-of-the-art web-based training equipment and commercial driving trucks for on-the-road training. The aspiring driver will be

required to complete a minimum of 200 hours of technical instruction prior to taking their licensure exam. The participant must successfully earn their commercial license to receive services for job placement. If unable to pass the required DSMV licensure, a student can repeat the training with additional out-of-pocket expenses. The four-week training program outline ensures all courses are created and instructed in accordance with the Entry Level Driver Training Rules and Regulations (ELDT) of the Federal Motor Carrier Safety Administration (FMCSA). The curriculum is pursuant to 49 CFR Part 380, Section 383. A copy of the FleetForce Academic Essentials Student Handbook and Curriculum Catalog can be provided upon request. FleetForce is a member and in compliance with the Florida Commission for Independent Education.

There are three Phases within the Training Program with competencies evaluated in each phase to address: (1) knowledge, (2) skill/work performance, and (3) career pathway. Critical thinking, skills competency, and evaluations are threaded throughout the program to ensure successful completion for the driver.

Phase One: CDL Program Recruitment, Assessment, Trucking Industry Career Counseling and Pre-Training Requirements.

Phase Two: Trucking Industry Orientation, Specialized Training Permitting Course, Entry Level Driver Training Rules, and Regulations (ELDT) of the Federal Motor Carrier Safety Administration (FMCSA), CDL Licensure Exam.

Phase Three: Job Placement, Career Pathway Development, and Job Retention.

Phase One will be provided by the FleetForce Recruiter and Student Services Coordinator. Phase Two consists of 200 hours of technical instruction. This training will be classroom and field-experience-based, providing the aspiring driver the opportunity to have field experience both on campus in a secured training location and on roads/highways. Phase Two training will be offered on the West Campus of PHSC, located in New Port Richey. Phase Three will be provided through on-the-job training and follow-up services provided by the academic partnership coordinator.

To ensure an increasing number of drivers are readily available for the immediate workforce need, Phase Two (consisting of 200 training hours) will be delivered over a four-week training period. This ensures a cohort of newly licensed drivers are exiting the program monthly. To understand the depth of this four-week training, the following components will be taught during Phase Two: Basic Commercial Trucking/Heavy Equipment Competence: Control Systems Dashboard, Pre and Post Trip Inspections, Basic Control, Shifting/Operating Transmission, Backing and Docking, Coupling and Uncoupling, Visual Search, Communication, Distracted Driving, Speed Management, Space Management, Night Operation, Extreme Driving Conditions, Hazard Perception, Skid Control, Railroad Crossings, Roadside Inspection, Maintenance, Handling and Documenting Cargo, Environmental Compliance, Fatigue and Wellness, Post-Crash Procedures, External Communications, and Basic Business Practices. The Field-Testing

Supervisor administers the competency written exam and field test. The aspiring driver will need to pass their Class A or Class B Licensure exam prior to being promoted to Phase Three.

Phase Three Job Placement, Career Pathway Development, and Job Retention provide a framework for career exploration, continuous on-the-job training, and lifelong learning.

C. Budget:

a. Budget Narrative:

FleetForce requests \$500,000.00 in WIOA short-term training funds to serve 83 individuals in the Pasco Hernando Workforce Region. The training cost per student is \$6,000. In addition to the \$500,000 being requested, FleetForce is requesting an additional \$27,000 for placement incentives once drivers have secured a job. An incentive for providing training and assistance with securing employment in the aggressive timeframe of this short-term training program would maximize results.

Short-Term Training costs: tuition/training vouchers are 100% of the budget component in the funding request. \$500,000 is being requested to provide Commercial Driver's Training to licensure for 83 participants. Class A licensure allows drivers secure jobs as Heavy and Tractor Trailer Truck Drivers. Class B licensure allows drivers to secure jobs as Industrial Truck and Tractor Operators. As reported during the December 8, 2022, CareerSource Pasco Hernando Board Meeting, the Department of Economic Opportunity GAP Analysis for Workforce Region 16 reflects an immediate need for **2,885** Class A and **962** Class B drivers.

The GAP Analysis also indicates training is only available outside the workforce service region. FleetForce understands the urgency of this training within the area and has the model to implement this training. Through the existing relationship with PHSC, FleetForce will offer CDL training onsite. The requested funding would resolve the lack of training for interested individuals within Pasco and Hernando Counties and provide an opportunity to start training immediately (as soon as March 1, 2023).

Budget Item	Annual Cost	Justification
Tuition and Training Fees: CDL Class A Training Course	\$500,000.00	This funding allows 83 participants to receive a training voucher for a CDL course and licensure.
Additional Training Incentive Request:	\$27,000.00	This funding is for incentives for job placement at \$325 per completed participant.

*A detailed budget breakdown, along with in-kind resources, is in Appendix A (Required Forms, Documentation, and Certification).

b. Cost Allocation Method:

The CDL training fees requested in the budget are on a fixed cost per participant fee of \$6,000. Below is the cost allocation of the requested amount:

- Instructional and Training Equipment: \$150,000 (30%): costs will include day cab tractor trailer, fuel, and routine maintenance for equipment at the PHSC location.
- Instructional and Support Personnel: \$150,000 (30%): costs will include full-time salaries plus benefits for instructional and supportive services staff dedicated 100% to this project.
- Fixed Cost and Operational Overhead: \$150,000 (30%): costs include annual licensure fee for training at PHSC, curriculum, course material, marketing, outreach, and administrative costs.
- Profit: \$50,000 (10%): allowable percentage as stated in the RFP.

100% of the training dollars requested will support training at the Pasco Hernando location. Additional in-kind resources, listed below and on the required budget form in Appendix A, detail the additional in-kind information. FleetForce understands the importance of this partnership with all parties involved to ensure a skilled pipeline of works exists.

c. In-Kind Resources/Support for Short-Term Training Program:

The requested funding will be matched by FleetForce with a 109% match contribution and will be spent by adhering to the following:

In-Kind Resource	In-Kind Support	Description
Instructional and Training Equipment	\$350,000.00	Provide, at minimum, three additional day cab tractor trailers for training onsite at PHSC, West Campus located in New Port Richey. Fuel and routine maintenance costs associated with training equipment.
Operational Expenses and Capacity Building	\$55,000.00	FleetForce Business Development team recruiting area employers to hire drivers once licensure is complete. Business Development has strong relationships with local employers to continually strengthen the existing pre-hire program. FleetForce works closely with Florida Trucking Association (FTA) to understand carrier needs and help address the driver shortage.

Personnel (Administrative, Instructional and Support)	\$115,000.00	Percentage of existing personnel's time associated with this training. Personnel includes a Recruiter, Director of Operations, Director of Business Development, Director of Accounting, Academic Partnership Coordinator, and President/Owner.
Marketing	\$25,000.00	This training program will be added to existing marketing campaigns focusing on the zip codes within the service region.
TOTAL IN-KIND RESOURCES	\$545,000.00	

A detail of each in-kind support is listed on the budget form located in Appendix A. The \$500,000 being requested in this proposal will be matched with in-kind resources from FleetForce totaling \$545,000 (109%); thus, further validating the true partnership amongst public and private entities to ensure quality training leading to high waged jobs is readily available.

d. Contingency Plans:

Prior to training execution, FleetForce's accounting team will meet with CareerSource Pasco Hernando grant designees to review proposed costs and understand the reimbursement process and necessary supporting documents required for monitoring reviews and/or audits. Therefore, a clear understanding of the training expenditures by all parties involved should eliminate the risk of disallowed costs associated with the project. If the unfortunate should occur, FleetForce will follow the resolution of the recipient and sub-recipient monitoring and audit findings policy as stated by the Florida Department of Economic Opportunity, Division of Finance and Administration, Policy Number 121. The purpose of that policy is to provide information and guidance on the resolution of findings and disallowed costs occurring from monitoring visits, audits, and state monitoring.

e. Ongoing Business:

Since 2020, FleetForce has been the subrecipient of numerous State and federally-funded projects through existing contracts with CareerSource Florida, the Florida Department of Education, and the Florida Department of Economic Opportunity. Expenses will be accrued to guarantee training occurs, while FleetForce seeks reimbursement for such allowable costs. This contract will make up 5% of the overall operating budget for 2023.

f. Method of Payment Requested:

This proposal is for short-term training to help fill the current vacancy of 3,000 commercial drivers needed within the workforce region. A fixed-unit price cost contract is being requested. Costs associated with this proposal is in one area: training. A fixed-unit price contract will allow monthly reimbursement for ongoing expenses. Supporting documentation includes but is not limited to student training invoices, documentation of enrollment, and matriculation and concludes with licensure to ensure expenses are consistent with the set fixed rate. By the fifth of each month, FleetForce will provide an invoice indicating the number of students receiving training and requesting reimbursement of the fixed unit price per contract.

g. Budget Maximization:

100% of this proposal is for tuition to support training expenses for individuals to secure a self-supporting job in as little as four weeks. Through already established internal procedures, FleetForce personnel will keep track of screened, assessed, and eligible individuals entering the 4-week training program. Upon program completion, FleetForce will provide job placement assistance and follow-up services. By only requesting one line item of funding (training dollars) this proposal not only provides accurate programmatic budgeting but also maximum utilization of funds.

D. Why FleetForce Truck Driving School?

The question is larger than just *'why FleetForce Truck Driving School'* for this short-term training need. The question is how will CareerSource Pasco Hernando address employee shortage and provide innovative workforce training resulting in a high-waged job? The solution must include industry driven training along with career assistance and job placement for the employment demand within the trucking industry to be addressed.

Trucking drives the economy. This proposal has referenced the 3,000 bent up demand jobs that are going unfilled within Pasco and Hernando counties. Per 2022 data from the Florida Trucking Association, 391,200 trucking industry jobs are in Florida. That averages out to 1 in 19 jobs in the state are in the trucking profession. Florida has 114,810 trucking companies. Primarily small, locally owned businesses, these companies are served by a wide range of supporting businesses. This profession is responsible for transporting the essentials needed to keep not only our state but country open. 95.4% of the manufactured tonnage is transported by trucks in Florida, which equals out to a shocking 470,310 tons per day.

American Transportation Research Institute (ATRI) has been engaged in critical transportation studies since 1954. The following graphics provide insight into workforce participation by age,

by age in selected industries, and younger driver utilization. All strengthening the case for expanding training opportunities especially for individuals 20-34 years of age.

Figure 1: Workforce Participation by Age Group

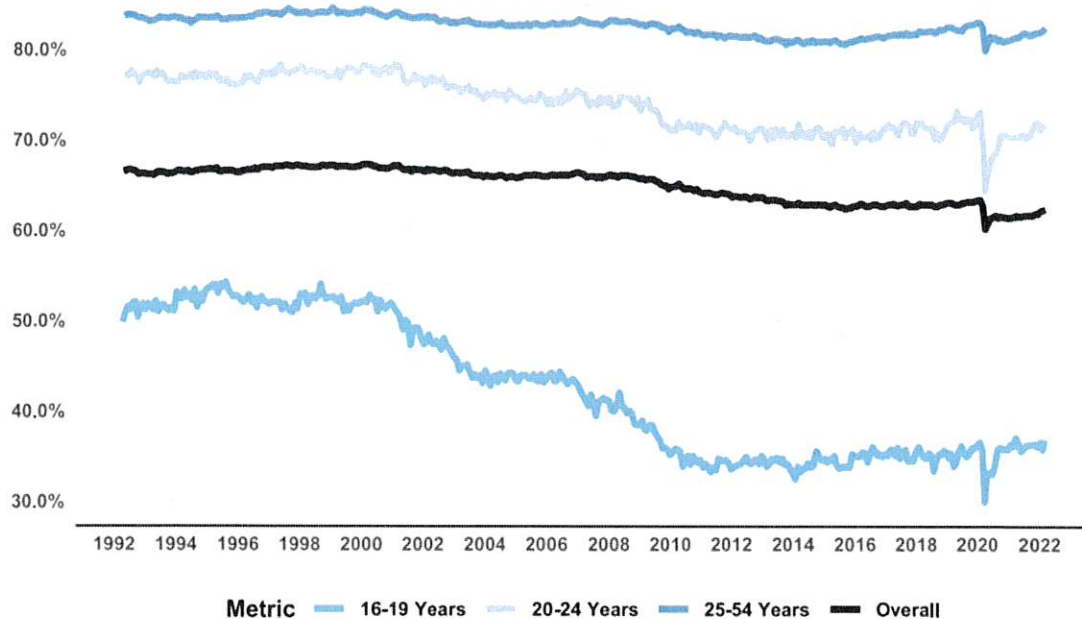


Figure 2: Workforce Participation by Age Group in Selected Industries: Data shows 44% of the trucking and transportation workforce participation rate is held by individuals 45-65 years of age. Within the next five to fifteen years, this 44% will no longer be in the trucking transportation industry. For goods to remain being delivered, it is vital to secure a pipeline of drivers to replace the nearly half of the current drivers. Figure 2 below indicates the age group breakdown profession.

Figure 2: Workforce Participation by Age Group in Selected Industries

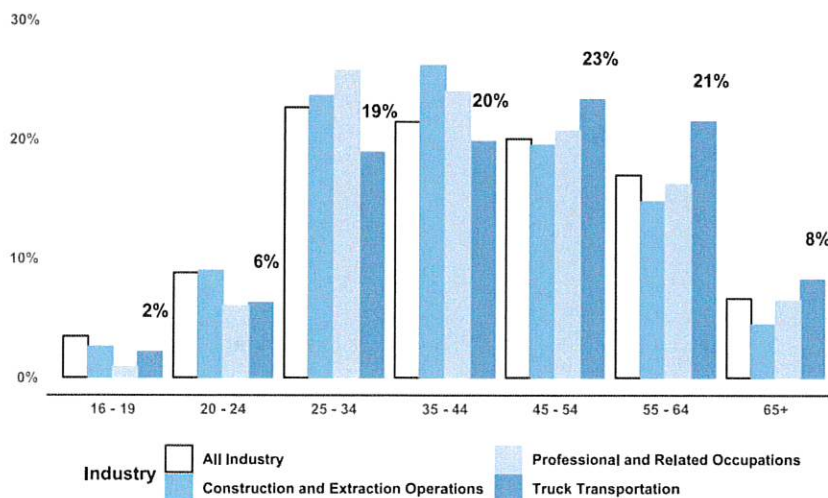
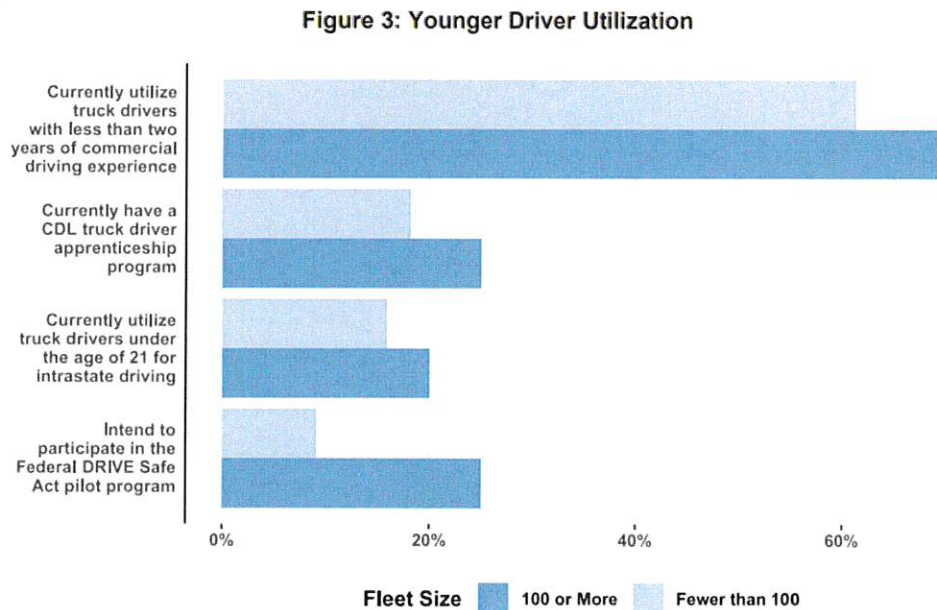


Figure 3: Younger Driver Utilization: Per the above graphic, only 25% of the current trucking transportation workforce are 20–34 years of age. Of this age demographic known as ‘young drivers,’ 60% of companies are utilizing truck drivers with less than two years commercial driving experience.



How can we as workforce practitioners contribute to keeping the essential goods on the road? By allocating federal and state funds to ensure aspiring drivers have the opportunity to train and secure a job that has the potential to be life changing. At FleetForce our mission is simple: empower drives, strengthen companies, and build communities.



Mr. Tra Williams
President
Fleet Force Truck Driving School
4950 Recker Highway
Winter Haven, FL 33880

Dear Mr. Williams,

Pasco-Hernando State College supports Fleet Force's efforts to meet the state and region's critical commercial truck driving needs.

The new training opportunities offered by Fleet Force at PHSC will allow our organizations to meet workforce needs in the future. It has come to my attention regarding a partnership under Career Source Pasco Hernando WIOA.

In addition, PHSC is committed to supporting the training endeavors by Fleet Force at the West Campus. We are pleased to hear about Career Source Pasco-Hernando WIOA grant will strengthen Fleet Force's ability to reach potential students in the Pasco and Hernando areas through the possible scholarship of \$6,000.

PHSC supports the partnership with Fleet Force under the Career Source Pasco Hernando WIOA grant.

Sincerely,

Timothy L. Beard, Ph.D.
President
Pasco-Hernando State College

EAST CAMPUS
36727 Blanton Rd.
Dade City, FL 33523
352.567.6701

**INSTRUCTIONAL
PERFORMING
ARTS CENTER**
8657 Old Pasco Rd.
Wesley Chapel, FL 33544
813.536.2816

NORTH CAMPUS
11415 Ponce de Leon Blvd.
Brooksville, FL 34601
352.796.6726

**PORTER CAMPUS AT
WIREGRASS RANCH**
2727 Mansfield Blvd.
Wesley Chapel, FL 33543
813.527.6615

SPRING HILL CAMPUS
450 Beverly Ct.
Spring Hill, FL 34606
352.688.8798

**WEST CAMPUS/
DISTRICT OFFICE**
10230 Ridge Rd.
New Port Richey, FL 34654
727.847.2727

phsc.edu
855.NOW.PHSC

We are Gold. Your Key to Success.

*An equal access/equal
opportunity institution*

PASCO-HERNANDO WORKFORCE BOARD, INC.

Budget Forms – RFP # 01-01042023 WIOA AD/DW_WT

Budget Item	Annual Cost	In-Kind	How Cost Determined	Justification	(For Board Use Only) Cost/Price Analysis		
					Reas.	Nec.	Basis
CDL Tuition and Training Fees:	\$500,000		Per student cost: \$6,000 x 83 participants Includes the 160-hour training program and state testing fee.	This fundings allows 83 participants to receive a training voucher for CDL course and licensure.			
Instructional Equipment: Heavy Tractor Trailers (Day Cabs) plus fuel and routine maintenance.		\$350,000		Instructional Equipment for onsite training located at PHSC, West Campus in New Port Richey. Contract will be through FleetForce Truck Driving School. This will provide for the additional three trucks needed, fuel, and preventive maintenance. The trucks can accommodate up to four students at a time for training.			
Personnel: FleetForce Director of Accounting		\$30,000		Percentage of work time allocated for grant fiscal management.			
Personnel: FleetForce Senior Director of Operations		\$30,000		Percentage of work time allocated for operational program coordination between recruiter, student services, and instructional team.			
Personnel: FleetForce Director of Business		\$20,000		Percentage of work time allocated for business			

Development						development specifically company recruitment for hiring training participants.			
Personnel: FleetForce President			\$10,000			Percentage of time allocated for collaboration with business, industry, and government leaders leading to program exposure for sustainability and future growth.			
Personnel: FleetForce Academic Partnership			\$25,000			Percentage of work time allocated for job placement and follow-up.			
Program Marketing and Outreach			\$25,000			FleetForce will add this training program to existing marketing campaigns focusing on the zip codes within service region.			
Operating Expenses and Capacity Building			\$55,000			FleetForce Business Development team recruiting area employers to hire drivers once licensure is complete. Business Development has strong relationships with local employers to continually strengthen the existing Pre-Hire program. FleetForce works closely with Florida Trucking Association (FTA) to under carrier needs and help address the driver shortage			
Profit/Program Income (%)									
TOTAL In-Kind Contribution			\$545,000.00			FleetForce is matching 109% of funds requested by providing in-kind resources for program contribution.			
TOTAL COST (100%)		\$500,00.00							

ORGANIZATIONAL BACKGROUND

1. Name of Organization: FleetForce Truck Driving School
2. Contact Person: Tra Williams, Owner and President
3. Address: 8437 Tuttle Ave #345 Sarasota FL 34243
4. Telephone Number: (404) 788-6478 5. FEID Number: 85-2281775
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 Florida, π 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 its proposed program;
 - f. it will comply with the assurances attached to this RFP, and the WIOA 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.

FleetForce Truck Driving School

Organization

Tra Williams, Owner/President

Name of Certifying Official

Signature

Date

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.

- | | |
|---|---|
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | <ol style="list-style-type: none"> 1. All positions with the proposing agency have up-to-date job descriptions. 2. All employees meet the minimum qualifications specified in their job descriptions. 3. All W-2's and I-9's with appropriate documentation are on file. 4. Withholding and FICA deposits have been made in full on a timely basis. 5. Insurance and bonding policies are current and all appropriate staff are covered. 6. The facilities of this agency and any training location are accessible to the disabled. Attach a completed ADA facility checklist. 7. The books of account are auditable. 8. Administrative and internal accounting controls are adequate to safeguard program assets. 9. The accounting system adequately accounts for program funds. 10. Financial reports fairly present accrued program expenditures by established cost categories. 11. Budgetary procedures are adequate to control expenditures. 12. The agency has a written accounting procedures manual that includes procedures for: <ol style="list-style-type: none"> a) coding of expenditures by: <ol style="list-style-type: none"> (1) contract year or program year (2) funding source (3) cost category; b) bank reconciliations c) posting to books d) monthly close-out e) trial balancing f) development of accruals g) segregation of duties h) cost allocation i) budgetary control j) cash management k) cash receipt and disbursement l) payroll m) reconciliation of any petty cash fund 13. The procedures in the accounting manual are being followed. 14. Internal controls <ol style="list-style-type: none"> a) for cash receipts: <ol style="list-style-type: none"> (1) cash is properly controlled and promptly deposited when received (2) funds are deposited in a bank in interest bearing checking accounts and secured by FDIC or other security b) checks are: <ol style="list-style-type: none"> (1) pre-numbered (2) adequately safeguarded (3) properly mutilated when voided (4) not allowed to be written for cash (5) not allowed to be signed in advance; |
|---|---|

☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No

☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No

☒ Yes ☐ No
☒ Yes ☐ No

☒ Yes ☐ No
☒ Yes ☐ No

☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No

c) for cash disbursements:

- (1) invoices are approved prior to payment
- (2) documentation accompanies checks to be signed
- (3) documentation is stamped to prevent reuse
- (4) control over signature machine is adequate
- (5) disbursements are made only by check
- (6) checks are not returned to preparer after signing

d) for bank reconciliations:

- (1) they are performed on time
- (2) they are performed by someone who does not perform cash functions
- (3) unusual items are investigated promptly

e) for payroll:

- (1) time sheets are used and signed by both the employee and supervisor
- (2) payrolls are approved by management for accuracy and existence of bona fide employees
- (3) preparation and check distribution functions are segregated
- (4) leave time is properly controlled

f) for purchases:

- (1) purchase orders are pre-numbered and controlled
- (2) receiving reports are prepared and compared to P.O. and invoice
- (3) returned purchases are controlled
- (4) payments are made within discount periods

15. The agency's budget has no areas for potential cost overruns.

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.

FleetForce Truck Driving School

Organization

Tra Williams, Owner/President

Name of Certifying Official

Signature

Date

1/18/23

CONFLICT OF INTEREST STATEMENT/CERTIFICATION

Contract No: RFP #

The Contractor 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 Grantee or independent agency requiring the goods or services described in these specifications has a material financial interest in this company.


Signature

B-3-1, LLC
Company Name

President
Name of Official (Type or Print)

8437 Tuttle Ave #345
Business Address

Sarasota, FL, 34243
City, State, Zip Code

SECTION II

I hereby certify that the following named Grantee official(s) and employee(s) having material financial interest(s) [in excess of 5%] in this company have filed the appropriate Conflict of Interest statements with the Grantee prior to the beginning date of this Contract.

Name	Title or Position	Date of Filing
_____	_____	_____
_____	_____	_____
_____	_____	_____

Signature

Company Name

Name of Certifying Official

Business Address

City, State, Zip Code

FEDERAL AND FLORIDA COMPLIANCE ASSURANCES AND CERTIFICATIONS

The parties (hereinafter referred to as "Contractor") acknowledge and certify that, to the extent applicable to this contract/agreement, funding source, program activities, and statutory requirements, the parties shall comply with the following (if applicable):

APPENDIX II TO PART 200—CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS

- A. **TERMINATION PROVISIONS (CONTRACTS OF \$150,000).** Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate. The parties agree that in the event Contractor shall fail to comply with any term, provision, or condition of this Agreement, then in the absence of a remedy provision contained elsewhere in the Master Agreement, Pasco-Hernando Workforce Board, Inc. may at its sole election terminate this Agreement without being liable to prosecution or may bring a claim for specific performance or may bring an action to recover damages caused by such breach. Additionally, Pasco-Hernando Workforce Board, Inc. (PHWB) may consult with an attorney concerning PHWB's rights hereunder, and Contractor agrees in each and any such case to pay to PHWB its reasonable attorney's fees therefore.
- B. **TERMINATION PROVISIONS (CONTRACTS OF \$10,000).** All contracts in excess of \$10,000 must address termination for cause and for convenience by the non-Federal entity including the manner by which it will be effected and the basis for settlement. The parties agree that in the event there is no provision contained elsewhere in the Master Agreement to the contrary, then the Parties agree that this Agreement may be terminated by either party with, or without, cause upon thirty (30) day's prior written notice. Further, PHWB is a quasi-governmental entity reliant in part on funding received from governmental grants. Accordingly, notwithstanding anything else contained herein to the contrary, PHWB shall have the right to terminate the Agreement or any of the agreements comprising the Master Agreement by reason of funding unavailability at any time by providing thirty (30) days advance written notice. If this agreement is terminated, all payments defined therein shall cease to be due as of the date of termination.
- C. **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."
- D. **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. 3141-3148).** When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to

laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or sub-recipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

- E. **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. 3701-3708).** Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.
- F. **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or sub-recipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or sub-recipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.
- G. **CLEAN AIR ACT (42 U.S.C. 7401-7671q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. 1251-1387), AS AMENDED.** Contracts and sub-grants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).
- H. **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 CFR 180.220) must not be made to parties listed on the government-wide

exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

- I. **BYRD ANTI-LOBBYING AMENDMENT (31 U.S.C. 1352).** Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.
- J. **SOLID WASTE DISPOSAL ACT, AS AMENDED BY THE RESOURCE CONSERVATION AND RECOVERY ACT (42 USC 6962; 2 CFR §200.322).** A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.
- K. **TRAFFICKING VICTIMS PROTECTION ACT OF 2000 (2 CFR 175.15(B)).** During the term of the Agreement, Contractor, and its employees, may not engage in severe forms of trafficking in persons, procure a commercial sex act, or use forced labor in the performance of the Agreement.
- L. **VETERAN'S PRIORITY OF SERVICE PROVISIONS (38 USC 4215; 20 CFR 1010).** A covered person is entitled to priority of service under any qualified job training program if the person otherwise meets the eligibility requirements for participation in such program. An entity of a State, a political subdivision of the State, or in this case, a Contractor, that administers or delivers services under a qualified job training program shall provide information and priority of service to covered persons regarding benefits and services that may be obtained through other entities or service providers; and ensure that each covered person who applies to or who is assisted by such a program is informed of the employment-related rights and benefits to which the person is entitled under this section.
- M. **EQUAL TREATMENT FOR FAITH BASED ORGANIZATIONS (29 CFR 2, Subpart D).** Any organization that participates in a program funded by federal financial assistance shall not, in providing services or in outreach activities related to such services, discriminate against a current or prospective program beneficiary on the basis of religion, religious belief, a refusal to hold a religious belief, or a refusal to attend or participate in a religious practice. However, an

organization that participates in a program funded by indirect financial assistance need not modify its program activities to accommodate a beneficiary who chooses to expend the indirect aid on the organization's program.

- N. **PURCHASE OF AMERICAN MADE PRODUCTS (P.L. 103-333 §507).** It is the sense of the Congress that, to the greatest extent practicable, all equipment and products purchased with funds made available under Public Law 103-333 should be American-made. Funds made available under this Public Law may be used to fund Contractor's performance under this Agreement. In providing financial assistance to, or entering into any contract with, any entity using funds made available in this Act, Contractor, to the greatest extent practicable, shall provide to such notice describing the statement made by the Congress, as to American made products.
- O. **PUBLIC ANNOUNCEMENTS AND ADVERTISING (P.L. 103-333 §508).** When issuing statements, press releases, requests for proposals, bid solicitations and other documents describing projects or programs funded in whole or in part with Federal money, all Contractors receiving Federal funds, including but not limited to State and local governments and recipients of Federal research grants, shall clearly state (1) the percentage of the total costs of the program or project which will be financed with Federal money, (2) the dollar amount of Federal funds for the project or program, and (3) percentage and dollar amount of the total costs of the project or program that will be financed by nongovernmental sources.
- P. **CODES OF CONDUCT (29 CFR 95.42).** The Contractor shall maintain written standards of conduct governing the performance of its employees engaged in the award and administration of contracts. No employee, officer, or agent shall participate in the selection, award, or administration of a contract supported by Federal funds if a real or apparent conflict of interest would be involved. Such a conflict would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in the firm selected for an award. The officers, employees, and agents of the Contractor shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors, or parties to sub-agreements. However, Contractor may set standards for situations in which the financial interest is not substantial or the gift is an unsolicited item of nominal value. The standards of conduct shall provide for disciplinary actions to be applied for violations of such standards by officers, employees, or agents of the Contractor.
- Q. **EMPLOYMENT ELIGIBILITY REQUIREMENTS.** Employment of unauthorized aliens by Contractor is considered a violation of the Immigration and Nationality Act. Contractor shall use the U.S. Department of Homeland Security's E-verify system to verify the employment eligibility of all new employees hired by Contractor during the contract term. Contractor shall be responsible for including the provisions of this paragraph in any context with, and requiring compliance by any/all subcontractors performing under this Agreement. If Contractor knowingly employs unauthorized aliens, in violation of this paragraph,, such action shall be cause for unilateral cancellation of this Agreement and PHWB may recover damages from Contractor resulting from such cancellation. Further, PHWB may unilaterally terminate this Agreement, without penalty, if Contractor is determined to have violated a prohibition in this paragraph of this Agreement; or has an employee who is determined by PHWB to have violated a prohibition in

this paragraph of this Agreement through conduct that is either associated with performance of this Agreement or imputed to Contractor using the standards and due process for imputing the conduct of an individual to an organization that are provided in 2 CFR part 180, "OMB Guidelines to Agencies on Government-wide Debarment and Suspension (Non-procurement)," as implemented by PHWB.

R. **ASSURANCES AND CERTIFICATIONS.** The Department of Economic Opportunity (DEO) will not award federal workforce funds where the PHWB or its contractors have failed to complete the ASSURANCES AND CERTIFICATIONS contained in this attachment. In performing its responsibilities under the Master Agreement, the Contractor provides the following certifications and assurances:

1. Assurances – Non-Construction Programs (SF 424 B)
2. Debarment and Suspension Certification (29 CFR Part 98 and 45 CFR Part 74)
3. Certification Regarding Lobbying (29 CFR Part 93 and 45 CFR Part 93)
4. Drug free Workplace Certification (29 CFR Part 98 and 45 CFR Part 82)
5. Nondiscrimination & Equal Opportunity Assurance (29 CFR Part 37 and 45 CFR Part 80)
6. Certification Regarding Environmental Tobacco-Smoke
7. Association of Community Organizations for Reform Now (ACORN) Funding Restriction Assurance (Pub. L 111-117)
8. Scrutinized Companies Lists Certification (Section 287.135.F.S.)

NOTE: Certain of these Assurances may not be applicable to your project or program. If you have questions, please contact the PHWB.

S. **ASSURANCES – NON-CONSTRUCTION PROGRAMS.** As the duly authorized representative of the Contractor, I certify that Contractor:

1. Will give the Department, the Comptroller General of the United States, and if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award, and will establish a proper accounting system in accordance with generally accepted accounting standards or Department directives.
2. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color, or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. 1681-1683, and 1685-1686), which prohibits discrimination on the basis of handicaps; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. 6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255) as amended, relating to nondiscrimination the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention,

Treatment and Rehabilitation Act of 1970 (P.L., 91-616) as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) Sections 523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. 290 dd.3 and 290 cc-3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights act of 1968 (42 U.S.C. 3601 et seq.) as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and (j) the requirements of any other non-discrimination statute(s) which may apply to the Agreement.

3. Will comply with the provisions of the Hatch Act (5 U.S.C. 1501-1508 and 7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.
4. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. 276a to 276a7), the Copeland Act (40 U.S.C. 276c and 18 U.S.C. 874), and the Contract Work Hours and Safety Standards Act (40.327-333), regarding labor standards for federally assisted construction sub-agreements.
5. Will comply with environment standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. 1451 et. seq.); (f) conformity of Federal actions to State (Clear Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et. seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205).
6. Will cause to be performed the required financial and compliance audits in accordance with the single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
7. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations and policies governing the programs associated with the Agreement.
8. Will comply with the procurement standards of 2 CFR 200.318 –200.326.

T. CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS – PRIMARY COVERED TRANSACTION. The Contractor certifies to the best of its knowledge and belief, that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by a State or a Federal department or agency;
2. Have not within a three-year period preceding the Agreement been convicted 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 antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

3. Are not presently indicted or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (B)(2) of this certification; and/or
4. Have not within a three-year period preceding the Agreement had one or more public transactions (Federal, State, or local) terminated for cause or default.
5. Have not been placed on the convicted vendor list following a conviction of a public entity crime as set forth in Fla. Stat. 287.133(2)(a).
6. Have not been placed on the discriminatory vendor list described in Section 287.134 Fla. Stat.

U. CERTIFICATION REGARDING LOBBYING – CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS. The Contractor certifies, to the best of its 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 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, an officer or employees of Congress, or employee of a Member of Congress in connection with this Federal 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 that language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants and contracts under grants, loans and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly;
4. 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 31 U.S.C. 1352. 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;
5. Contractor shall not, directly or indirectly, expend either state or federal funds either (i) for the purpose of lobbying any branch, unit or instrumentality of the state or federal governments, or (ii) for any otherwise allowable purpose which could result in unauthorized lobbying.

V. **CERTIFICATION REGARDING DRUG-FREE WORKPLACE REQUIREMENTS.** Pursuant to the Drug-Free Workplace Act of 1988 and its implementing regulations codified at 29 C.F.R. Part 94, the undersigned Contractor, attests and certifies that it will provide a drug-free workplace by the following actions.

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the RWBs' workplace and specifying the actions that will be taken against employees for violation of such prohibition.
2. Establishing an ongoing drug-free awareness program to inform employees concerning:
 - a. The dangers of drug abuse in the workplace;
 - b. The policy of maintaining a drug-free workplace;
 - c. Any available drug counseling, rehabilitation and employee assistance programs;
 - d. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
3. Making it a requirement that each employee to be engaged in the performance of the agreement be given a copy of the statement required by paragraph V.1. of this certification.
4. Notifying the employee in the statement required by paragraph V.1. of this certification that, as a condition of employment under the contract, the employee will:
 - a. Abide by the terms of the statement;
 - b. Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring the workplace no later than five (5) calendar days after such conviction.
5. Notifying the PHWB in writing ten (10) calendar days after receiving notice under subparagraph 4.b. of this Section from an employee or otherwise receiving actual notice of such conviction. Provide such notice of convicted employees, including position title, to every Grant Officer on which Grant activity the convicted employee was working. The notice shall include the identification number(s) of each affected contract/Grant. An Incident Report Form, which can be found on the Department's intranet site, should be completed and submitted to the following address:

Office of the Inspector General
Department of Economic Opportunity
MSC# 130, Caldwell Building
107 East Madison Street
Tallahassee, Florida 32399-4126

6. Taking one of the following actions, within thirty (30) calendar days of receiving notice under subparagraph 4.b., with respect to any employee who is so convicted.

- a. Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973 as amended.
 - b. Requiring such employee to participate satisfactorily in drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State or local, health, law enforcement, or other appropriate agency.
7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of this entire certification.

W. *NONDISCRIMINATION & EQUAL OPPORTUNITY ASSURANCE.* As a condition of the Contract the Contractor assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

1. Section 188 of the Workforce Investment Act of 1998 (WIA) which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title IB financially assisted program or activity;
2. Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin;
3. Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities;
4. The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age;
5. Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in education programs; and
6. The American with Disabilities Act of 1990 (Pub. L. 101-336), prohibits discrimination in all employment practices, including, job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities.

The Contractor also assures that it will comply with 29 CFR Part 37 and all other regulations implementing the laws listed above. This assurance applies to the Contractor's operation of the WIA Title I – financially assisted program or activity, and to all agreements the Contractor makes to carry out the WIA Title I – financially assisted program or activity. The Contractor understands that PHWB, DEO and the United States have the right to seek judicial enforcement of the assurance.

X. *CERTIFICATION REGARDING ENVIRONMENTAL TOBACCO-SMOKE.* As a condition of the Contract the Contractor assures that it will comply fully with the certification regarding environmental tobacco-smoke.

The Pro-Children Act of 2001, 42 U.S.C. 7181 through 7184, imposes restrictions on smoking in facilities where Federally-funded children's services are provided. Grants are subject to these requirements only if they meet the Act's specified coverage. The Act specifies that smoking is prohibited in any indoor facility (owned, leased, or contracted for) used for the routine or regular provision of kindergarten, elementary, or secondary education or library services to children under the age of 18. In addition, smoking is prohibited in any indoor facility or portion of a facility (owned, leased, or contracted for) used for the routine or regular provision of federally funded health care, day care, or early childhood development, including Head Start services to children under the age of 18. The statutory prohibition also applies if such facilities are contracted, operated or maintained with Federal funds. The statute does not apply to children's service provided in private residences, facilities funded solely by Medicare or Medicaid funds, portions of facilities used for inpatient drug or alcohol treatment, or facilities where WIC coupons are redeemed. Failure to comply with the provision of the law may result in the imposition of a civil monetary penalty of up to \$1,000 per violation and/or the imposition of an administrative compliance order on the responsible entity.

- Y. **ASSOCIATION OF COMMUNITY ORGANIZATIONS FOR REFORM NOW (ACORN) FUNDING RESTRICTIONS ASSURANCE (Pub. L. 111-117).** As a condition of the Agreement, the Board assures that it will comply fully with the federal funding restrictions pertaining to ACORN and its subsidiaries per the Consolidated Appropriations Act, 2010, Division E, Section 511 (Pub. L. 111-117). The Continuing Appropriations Act, 2011, Sections 101 and 103 (Pub. L. 111-242), provides that appropriations made under Pub. L. 111-117 are available under the conditions provided by Pub L. 111-117. Note: As of June 20, 2011, this matter is in litigation in the District Court for the Eastern District of New York.
- Z. **SCRUTINIZED COMPANIES LISTS CERTIFICATION, SECTION 287.135, F.S.** If a board that is affiliated with the local governmental entity enters into a contract in the amount of \$1 million or more, in accordance with the requirements of section 287.135, F.S., the Contractor will submit a certification that the contractor is not listed on the Scrutinized Companies that Boycott Israel list, or is engaged in a boycott of Israel, the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, engaged in business operations in Cuba or Syria, or meets the conditions for exemption as provided in section 287.135(4), F.S. Both lists are created pursuant to section 215.473, F.S.
- AA. **PUBLIC RECORDS LAW; SUNSHINE LAW.** Contractor agrees to comply with public records and open meeting requirements as applicable including 2 CFR 200.333, and 2 CFR 200.336.
- BB. **INDIVIDUAL NON-DISCLOSURE AND CONFIDENTIALITY CERTIFICATION.** To the extent any Contractor, or employee of Contractor, is granted authorization to access workforce information systems, including systems containing confidential information, Contractor and its employees are required to complete the established Individual Non-Disclosure and Confidentiality Certification Form upon request.
- CC. **MANDATE TO REPORT ABUSE OF VULNERABLE POPULATIONS.** In compliance with Sections 39.021 and 415.1034 Florida Statutes, if Contractor, and its agents, employees, or others performing services on Contractor's behalf, knows or has reasonable cause to suspect that a child, aged person or disabled adult is or has been abused, neglected, or exploited, Contractor, and its agents, employees and others performing services on Contractor's behalf, agree to immediately report such knowledge or suspicion to the Florida Abuse Hotline by calling

1-800-96ABUSE or via the web reporting option at [http:// www.dcf.state.fl.us/abuse/report](http://www.dcf.state.fl.us/abuse/report) or via fax 1-800-914-0004.

STATUTORY AND NATIONAL POLICY REQUIREMENTS. In compliance with 2 CFR, section 200.300,) a) The Federal awarding agency must manage and administer the Federal award in a manner so as to ensure that Federal funding is expended and associated programs are implemented in full accordance with the U.S. Constitution, Federal Law, and public policy requirements: Including, but not limited to, those protecting free speech, religious liberty, public welfare, the environment, and prohibiting discrimination. The Federal awarding agency must communicate to the non-Federal entity all relevant public policy requirements, including those in general appropriations provisions, and **incorporate them either directly or by reference in the terms and conditions of the Federal award (emphasis added.)** b) The non-Federal entity is responsible for complying with all requirements of the Fed

By signing below, the Contractor certifies and assures that it will fully comply with the applicable assurances outlined above.

Contractor:

Signature

Tra Williams, Owner and President, FleetForce Truck Driving School

Print Name and Title

Appendix 2

Appendix 2: References

Proposers shall provide three (3) references for services outlined in this RFP.

Reference #1

Company Name: Florida Trucking Association (FTA)
Contact Person: Alix Miller, PhD., President of FTA
Address: 350 E College Avenue, Tallahassee, FL 32301
Phone Number: (850) 222-9900
Email: alix@floridatrucking.org
Service Dates: 2020-present

Reference #2

Company Name: Domino's Supply Chain Operations
Contact Person: Dane Worely, Florida Senior Director
Address: 7600 American Way, Groveland, FL 34736
Phone Number: (352) 429-5555
Email: dane.worley@dominos.com

Service Dates: FleetForce has provided training for Domino's employees since 2020 to present. In addition, Domino's is an employer partner in the FF CDL Apprenticeship Program.

Reference #3

Company Name: Florida House of Representatives, House District 40
Contact Person: Representative Jennifer Canaday
Address: P.O. Box 2231, Lakeland, FL 33806-2231
Phone Number
Email: jennifer@jennifercanady.com
Service Dates: Serving her district for two decades.

As part of the reference check process, PHWB reserves the right to review the specific qualifications and relevant capabilities of all personnel; review licensing; review audits; and contact any individuals, agencies or employers listed in the proposal and/or others who may have experience or knowledge of the bidder's performance and qualifications to do the work.

FLEETFORCE TRUCK DRIVER SCHOOL

JOB OVERVIEW	
POSITION/TITLE	Recruiter
DEPARTMENT	SALES
LOCATION	FleetForce Truck Driving School-Bradenton Florida
REPORTS TO	Director of Recruitment –Darren Brock Program Director – Sheri Neff
GENERAL JOB DESCRIPTION	
<p>Responsible for driving revenue and achieving company sales goals by maximizing the flow of new business from each of our three target markets: 1) individual students, 2) corporate training partners, and 3) municipal and governmental agencies. Communicate closely with the Director of Instruction and the Director of Student Services to build a pipeline of new business that backfills existing enrollments and contracts. Identify and convert existing CDL training opportunities into FleetForce market share within the State of Florida and beyond. Work with the CEO to expand FleetForce's reach within the trucking industry and all CDL training verticals.</p>	
DUTIES & RESPONSIBILITIES	
<ol style="list-style-type: none"> 1. Live and work within the company Core Values. 2. Serve as the single point of contact for new business inquiries. 3. Field and capture telephone, in-person, and online sales leads. 4. Use the company CRM to funnel leads through our sales and onboarding process. 5. Cold Call new business opportunities via phone and in person. 6. Manage the Business Development departmental budget. 7. Maintain a close watch on weekly and monthly revenue budget-to-actuals. 8. Create, build, and strengthen municipal, corporate partner, and student relationships. 9. Ensure internal, State, and Federal guidelines, policies and procedures are communicated and always followed. 10. Manage sensitive issues to maintain the school's good reputation. 11. Prepare and file documents in accordance with your individual job description. 12. Prepare and file documents as required under State and Federal Guidelines. 	
QUALIFICATIONS	
<p>MUST be 21 years of age or older. MUST be able to pass a pre-employment Drug/Alcohol test. MUST have a clean driving history. MUST prefer a commission-driven compensation structure where a limited base salary is offset by virtually unlimited potential upside. MUST have a High School Diploma or Equivalency, Bachelor's Degree Preferred.</p>	
SKILLS & ABILITIES	
<p>MUST have the ability to effectively communicate in English in person, via phone, and in front of large groups that could include C-Level executives. MUST have the ability to read and interpret business contracts. MUST be fluent with Microsoft Computer Programs including Word, Exel, PPT, etc. MUST have excellent time management and organization skills. Knowledge of Commercial Driver License programs is not required but requested. CRM Management experience a plus.</p>	
WORKING CONDITIONS	
WORK ENVIRONMENT	Inside, office location in a controlled temperature environment. May spend time on the FF CDL skill site which is outside and not covered. Occasional overnight travel less than 10%. Infrequent conference and event attendance, 4-5 nights per year.
HOURS/SHIFTS	FLEETFORCE operates 7 days/week. Weekend work will be required depending on workload.
SALARY/BENEFITS	Heavily commissioned. Paid Holidays. Company-sponsored Healthcare and retirement. Paid Time Off.

FLEETFORCE TRUCK DRIVER SCHOOL

JOB OVERVIEW	
JOB TITLE	COMMERCIAL DRIVER LICENSE INSTRUCTOR
DEPARTMENT	Training
LOCATION	FleetForce Truck Driver School
REPORTS TO	Lead Instructor and Regional Manager
GENERAL JOB DESCRIPTION	
Utilize a variety of effective, professional teaching techniques and methods that will assist students in attaining the performance objectives of the course. Instruct students in a classroom environment, on a skills course, and behind the wheel local driving using an approved curriculum.	
DUTIES & RESPONSIBILITIES	
<p>Instruct and train students on the following objectives:</p> <ol style="list-style-type: none"> 1. Vehicle Pre-trip Inspections 2. Basic control skills (backing into specifically designed areas) 3. Uncoupling and coupling of the tractor/trailer 4. Basic shifting techniques (to include double clutching) 5. Train the students to safely operate a commercial vehicle on rural and city roadways 6. Prepare and file student records pertaining to training activities, testing results, and performance evaluations 7. Perform all other related duties as requested by the Lead Instructor and/or School Director 8. Maintain ELDT compliance as well as compliance with all other State and Federal agencies. 	
QUALIFICATIONS	
MUST Possess a valid Florida Class A CDL with a minimum of three (3) years driving experience. A current DOT Medical card (or the ability to obtain one). MUST be able to pass a pre-employment Drug/Alcohol test. MUST have a clean driving history.	
SKILLS & ABILITIES	
<p>MUST have the ability to effectively communicate in English.</p> <p>MUST have the ability to efficiently complete tasks in a timely manner and by deadlines.</p> <p>MUST have the ability to work productively as a team and independently.</p>	
WORKING CONDITIONS	
WORK ENVIRONMENT	Most of the training time is spent outdoors. MUST be able to endure Florida's hot summer temperatures while standing on a paved surface for long periods of time.
HOURS / SHIFTS	FLEETFORCE is operational 7 days/week. Weekend work may be required depending on workload.
SALARY	Will commensurate with experience



Student Services Coordinator
FleetForce Truck Driving School

Job details

- Full-time

Benefits

- Health insurance
 - Paid time off
 - Dental insurance
 - 401(k)
-

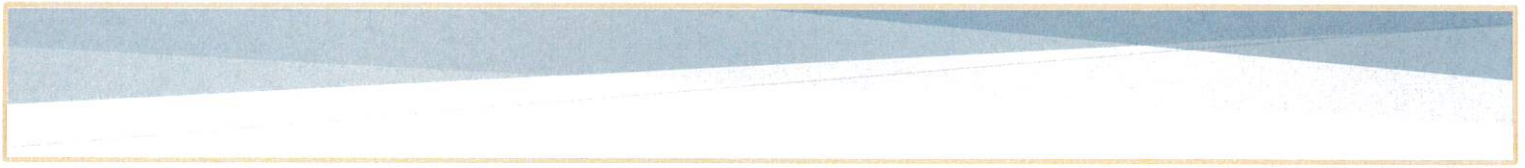
Job description

The Student Services Coordinator is responsible for administrative management with a primary focus on new student enrollment and will oversee and assist students with course registration and other requirements as needed.

This person must be highly organized, resourceful, professional in communication and interactions, able to multi-task, and be extremely detail oriented. An ability and willingness to work both independently and to collaborate with peers and management is a must.

We rely on several different computer processes in the course of business, so the ability to learn and master multiple software platforms is absolutely necessary. Many of these programs are government related, so you will need to be able to pass a thorough background check which will include fingerprinting and drug testing.

We are a fast-paced training facility, which will require you to maintain a positive and professional image and maintain composure under pressure.



RESUME

January 16, 2023

Abstract

A summary of my qualities in customer service and leadership required to perform any job duties as requested by my future employer.

SHERI LYN NEFF
Sheri3312@gmail.com

SHERI LYN NEFF

OBJECTIVE

To secure a position in an organization that offers challenge and opportunity for my career development and at the same time serve the organization to the best of my ability. I would like to gain new skills while utilizing my current area of expertise of customer service and long-term knowledge in the motor vehicle and commercial driver license field.

SKILLS & ABILITIES

I have many skills and abilities. Including but not limited to:

- Strong Communication Skills
- Adaptability and ability to work under pressure
- Organizational skills and customer service orientation
- Accuracy and attention to details
- Initiative with a high level of energy
- Project management skills: Influencing, leading, negotiating and delegating abilities
- Resourceful
- Tolerant to stressful situations

EXPERIENCE

SENIOR DIRECTOR OF OPERATIONS, FLEETFORCE TRUCK DRIVING SCHOOL

September 30, 2021-Current

I oversee all operations of the trucking school. I began my career at FleetForce Truck Driving School as a Program Director. I am responsible for student instructing, commercial contracts, creating curriculum, CDL testing, and managing employees. I created and implemented the required Entry Level Driver Training curriculum for this school and ensure that we stay up to date with FMCSA regulations and policies. This position requires intense communication with both internal and external customers.

INDEPENDENT CONSULTANT, F.A.C.T.S.

April 15, 2021-Current

I retired from the State of Florida after 30 years of service and began my own consulting business. This business known as Full Accountability in Commercial Testing Standards continued the duties and responsibilities I held as a CDL Compliance Officer. I consult with various Third-Party Testing Administrators and conduct the required quality assurance requirements under their contract.

CDL COMPLIANCE OFFICER, DEPT OF HIGHWAY SAFETY AND MOTOR VEHICLES

August 18, 2017-April 15, 2021

I was responsible for customer service both internally and externally. I was responsible for observing and overseeing commercial driver license testing compliance for an assigned zone. Compliance included

auditing of testing records, covert operations, and co-scoring with certified testers to ensure the compliance and integrity of the Third-Party Testing system.

ADMINISTRATIVE HEARING OFFICER, DEPT OF HIGHWAY SAFETY AND MOTOR VEHICLES

August 14, 2015-August 17, 2017

I was responsible for customer service both internally and externally. I was an administrative judge that reviewed driving records of sanctioned drivers. Upon review, I would hold hearings to determine and grant eligibility for a hardship license or potential reinstatement. I typed final orders and communicated with law enforcement and attorneys that were involved in the litigant cases.

TITLE TECHNICIAN, PALM AUTOMALL

March 28, 2015-August 13, 2015

I handled all title work for the dealership incoming and outgoing. I assisted the salespeople with customer handling of dealer paperwork. This position required knowledge of all dealer data systems. Input was required in a timely manner for which I was able to maintain.

TECHNICAL SPECIALIST III, CHARLOTTE COUNTY TAX COLLECTOR

April 10, 2010-March 27, 2015

I was responsible for all aspects of customer service both internal and external. I have knowledge of all FRVIS, Dealer work, FDLIS, IMS, Hunting and Fishing, D.A.V.I.D, Cash Handling, Inventory, Commercial Driver License and Immigration Requirements. I held quarterly training sessions for all clerks on Driver License procedures. I became tax Collector Certified in 2013

OFFICE MANAGER II, DIVISION OF DRIVER LICENSES

11/16/1990-4/9/2010

I started as an Examiner I in November 1990 in Port Charlotte. I was responsible for all customer service, cash handling, and administering both written and driving exams. In August 1994 I was promoted to Examiner II in Port Charlotte where I continued my career increasing my duties serving as Acting Supervisor in their absence. In August 2002 I was promoted to Office Manager II in Cape Coral where I had the opportunity to supervise 13 employees. During my 8 years as Office Manager, I managed 3 offices at one time and over 20 employees. In 2010 I was told that the offices were closing and being taken over by the Tax Collector. I was fortunate enough to get hired by the Charlotte County Tax Collector. I was awarded Office Manager of the Year three times during my career. I became a Certified Driver License Examiner in 2004.

EDUCATION

CHARLOTTE HIGH SCHOOL, PUNTA GORDA, FL-DIPLOMA

I graduated in 1985 with a 3.4 GPA. My studies were in Business.

COMMUNICATION

I became a Trainer for the Charlotte County Tax Collector in 2012. I held quarterly training sessions with all Driver License Clerks. I communicated any changes on procedures with all clerks through my chain of command. I am currently assisting in instructing students in obtaining their commercial driver license.

LEADERSHIP

I hold value in my positions. I learn something everywhere I go; I love everywhere I go, and I share knowledge everywhere I go. Successful leaders see the opportunities in every difficulty rather than the difficulty in every opportunity.

REFERENCES

MURLENE WARD

Compliance Officer, DHSMV
850-635-1412

MARY O'KEEFE

Program Director, Pinellas Technical College
727-265-8515

KIRSTEN THOMPSON

Administrator, Florida Gulf Coast University
239-478-4878

Darren Brock

Tampa, FL | 813.388.1115 | darren@usa.net | linkedin.com/in/darrenbrock

CAREER SUMMARY

- Senior Sales and Operations Leader with 20+ years of experience in process improvement and proven profitability increase, specializing in strategic business development success
- Accelerated regional performance by 12% in YOY annual sales, resulting in a \$1M revenue increase, achieving over \$10M annually
- Oversees 10 retail stores, directly managing 10 general managers and indirectly manages 65 total employees within the division
- Recognized as #1 out of 135 in region in all arounds for non-renewals in 2018, achieving only 8% delinquency average for the year as opposed to a company average of 20%
- Increased revenues and profits from losing \$90K monthly to gaining \$30K, growing customer base nearly 10%
- Increased team member retention by 30% through effective hiring and training, taking turnover from 80% down to 20%

CORE COMPETENCIES

- Sales & Operations Training
- Senior Management
- P&L Management
- Strategic Business Development
- Budgeting
- Inventory Management
- Staff Development & Leadership
- Procurement
- Vehicle Fleet Management
- Productivity Increase
- Product Management
- Operations Reengineering
- QuickBooks Proficiency
- Employee Retention
- Client Management
- Profit Increase

PROFESSIONAL WORK EXPERIENCE

FLEETFORCE TRUCK DRIVING SCHOOL

2021 – CURRENT

Sr Director of Business Development

- Grew existing operations and sales by 435%
- Implemented many CRM and operational technologies
- Trained and developed new team of sales professionals

AARON'S – WEST ATLANTA & EAST FLORIDA

2017 – CURRENT

Regional Manager

- Grew East Florida Region from #14 to #3 region in 4 months through client management training, improving morale and workforce planning
- Accelerated regional performance by 12% in YOY annual sales, resulting in a \$1M revenue increase, achieving over \$10M annually
- Oversees 10 retail stores, directly managing 10 general managers and indirectly manages 65 total employees within the division
- Provides training to GMs through strategic role playing to fulfill rental agreements, achieving a 6% return rate, achieving a 4% decrease
- Recognized as #1 out of 135 in region in all arounds for non-renewals in 2018, achieving only 8% delinquency average for the year, opposed to a company average of 20%
- Top 10% in customer growth by growing 300+ customers in 2018, achieving 6% customer base growth

- Increased team member retention by 30% through effective hiring and training, taking turnover from 80% down to 20%

AARON'S / HOME SMART – NORTHEAST, FL

2013 – 2016

Regional Manager

- Managed operations while implementing and developing policies to increase customer satisfaction through behavioral training for 6 corporate stores
- Acknowledged as the #1 best performing region in company all arounds in KPI including revenue increase, customer gain, charge off percentage, profit percentage and customer service scores

- Implemented sales programs to grow output of sales by training 6 direct reports and 50 indirect
- Increased revenues and profits from losing \$90K monthly to gaining \$30K monthly, growing customer base nearly 10%
- Coordinated sales and collection development programs, as well as workforce improvement to achieve regional goals

SOUTHEASTERN ASSET SERVICES – TAMPA, FL

2011 – 2013

Director of Operations - Call Center

- Reorganized property preservation exceeding \$18M annually through talent acquisition, training, and restructuring, resulting in stabilizing operational procedures, allowing for growth
- Streamlined business operating procedures, including accounting and financial software implementation, leading to an increase in transparency and a 30% increase in productivity, and \$300K cost savings annually
- Created a system of accountability and training for 40 employees in a call center environment designed to exceed vendor relationships, leading to a 20% increase in client base
- Procured new software to track work orders, ensuring a timelier completion for clients, increasing productivity by 60%
- Increased efficiency by 40% through the implementation of new financial software designed to manage all invoices, client billing, and financial statements

RENT MAX RENTAL PURCHASE – TAMPA, FL

2003 – 2011

President/Owner

- Built business from ground up, managing 5 location chain with 3000+ customers, exceeding \$5M in annual revenue
- Maintained low operating costs with an efficient business model to facilitate growth with only 35 employees
- Managed all financial responsibilities for the full P&L experience of the company including budgeting, financial analysis, capital investments, and lines of credit
- Directed creative team to implement monthly direct mail campaigns and annual television marketing
- Attended 2 trade shows yearly to consistently build relationships with vendors
- Streamlined training programs to ensure high customer service and 100% customer retention
- Implemented all company policies and performance management guidelines to ensure 100% compliance
- Built and managed a fleet of 12 delivery vehicles
- Responsible for product mix to meet demands of the customer demographics in each store location by procuring, merchandising and deploying with store teams
- Targeted and negotiated sale to one of the largest rental purchase companies in the nation, achieving a 12% profit margin

HOMECHOICE – RENTWAY – FT. LAUDERDALE, FL

1996 - 2003

Regional Manager

- Managed complete operations for 12 stores, growing region to \$7M+ in revenue and 20% profit margin
- Created unprecedented efficiency in cost reductions reducing charge offs from 7% to 2%
- Responsible for all hiring and training, including 12 general managers and 96 staff, developing store managers and promoting within the organization
- Built sales programs to drive revenue through marketing and operations, growing revenue by 8-9% YOY

EDUCATION

University of South Florida – Tampa, FL

Bachelor of Science, Marketing

Licensed Florida Insurance Agent

Tra Williams, CFE

Lineage - Legacy - Service

📞 404-788-6978 @ Tra.W@iCloud.com 📍 St. Augustine, Florida

EXPERIENCE

President/Vice-President

LAE/Lakeview Center-Baptist Health 2013 - 2019 Pensacola, FL

- Oversight of growth, operation, and profitability of the social enterprise division of this \$250M non-profit. Lakeview provides vocational, behavioral & child protective services to abused children and people with mental illnesses, addictions, disabilities.

President

Eastbourne Brands 2011 - 2013

- Provided turnkey franchise solutions for entrepreneurs ready to expand their brand through the franchise business model along with operational and developmental support for existing franchises

President

Petrus Brands/Planet Smoothie 2010 - 2011 Atlanta, Georgia

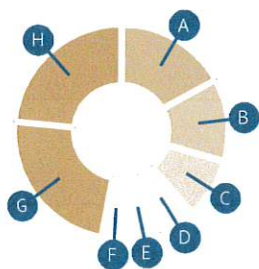
- Strategic leadership of this international franchise, awarded 'Future 50' by Restaurant Business and 'Sweet 16' by Fast Casual magazine with 125 stores in 19 states and abroad & annual sales over \$31M
- Awarded Corporate Partnership with Susan G. Komen For the Cure

Vice-President of Operations

Petrus Brands/Shanes Rib Shack 2008 - 2010 Atlanta, Georgia

- Executed the President & Founder's vision of the fastest growing fast casual BBQ concept in the world, named #20 of Fast Casual magazine with 75 stores in 13 states & annual sales grossing over \$71M
- Developed strategic partnership with Atlanta Braves benefitting the Georgia Transplant Foundation

MY TIME



- A Inspiring/nurturing my team
- B Expanding the LCI mission
- C Working on my books
- D Mentoring young leaders
- E Exercising my mind and body
- F Cooking for my family
- G Taking Bodhi for walk
- H Daydreaming about lost treasure

INDUSTRY EXPERTISE

Business Development

Directional Modeling

Work Flow Standardization

Scalable Infrastructures

Operational Excellence

Strategic Planning

STRENGTHS

- 👤 Servant Leadership
- 👤 Market Penetration
- 👤 Building and Leveraging Relationships
- 👤 Business Development
- 👤 Cross-Departmental Engagement

I AM MOST PROUD OF

👤 My Humble Roots

In rural Georgia where I was taught the value of hard work, self-reliance & perseverance

👤 The Lessons Learned

Each time I have picked myself up after a setback to start again

👤 The Enduring Relationships

I have built with service-minded leaders and franchise professionals over the last two decades

👤 Serving as Florida State Captain of the Franchise Action Network

Representing the interests of franchising in the great State of Florida and leading the State Delegation on Capitol Hill each September

👤 My Core Values

Instilled in me and my siblings by my mother as she raised us by herself

AWARDS

- 🏆 Awarded the Inaugural Gray Plant Mooty Scholarship for the CFE Program

EDUCATION

Bachelor of Science

University of Georgia

1991 - 1995 Athens, Georgia

Franchise Management

Georgetown University

2012 - 2013 Washington, D.C.

PASCO-HERNANDO WORKFORCE BOARD, INC.
Proposal Cover sheet

Submitted in response to RFP # 01-01042023 WIOA AD/DW_WT

NAME OF PROPOSING AGENCY: New Horizons Computer Learning Center of Tampa Bay

ADDRESS: 5402 W Laurel st., Suite 106 Tampa, FL 33607

TELEPHONE NUMBER: 813-387-3504

FAX NUMBER: 813-387-3511

EMAIL ADDRESS: bobby.ceklic@nhtampabay.com

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

Bobby Ceklic – General Manager

I do hereby certify that this proposal is submitted in accordance with the provisions and conditions outlined in RFP # 01-01042023 WIOA AD/DW_WT, 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.

Bobby Ceklic

1/26/2023

Signature of Individual with Signatory Authority

Date

Bobby Ceklic – General Manager

Typed name and Title

PASCO-HERNANDO WORKFORCE BOARD, INC.

Proposal Abstract – RFP # 01042023

Name of proposing agency: New Horizons Tampa Bay

Total proposed cost: \$ 420,000

Proposal is for (check one):
☒ Performance-based, fixed-unit cost contract.
☐ Cost-reimbursement contract with demonstrated performance holdback.
☐ Percentage amount of performance holdback:

Description: Provide a brief but thorough summary of the experience, capabilities and plans of the proposing organization, including the requirements listed in Part 3, Section D2:

2. Proposal Abstract – use form provided [1-2 pages]

- Describe the intentions and purpose of your organization, and provide your organization's mission statement.

New Horizons Computer Learning Centers's mission statement is "To remove obstacles and give people all over the world every opportunity to reach their potential."

- Describe your philosophy for management and service delivery.

100% commitment to our customer success is what we offer. NHTB has a customer-centric approach with end result in mind. We understand that everyone is unique in how they learn and what they consider success so we work with customers from a day one to identify and understand their needs so we can provide the best possible learning solution and ensure they have amazing end user experience.

- Describe whom you see as your customer(s) in the CareerSource Pasco Hernando System, and define your view of quality service to those customers.

Our typical customer in Pasco Hernando is unemployed, under-employed, low income customers looking for a fresh start, that lacks specific skills or certifications to get the type of job they want to become self-sufficient and needs to get back to work as soon as possible.

- Discuss your management structure, and describe your strategies for motivating staff from different organizations to provide excellent customer service while achieving measurable performance outcomes.

Our hands-on approach to day to day management and center operation gives us ability to identify any challenges and opportunities to get even more optimal in our daily operation. We remain in touch with our students daily, weekly, monthly as needed. Student services and placement assistance is available from a day one. Our leadership team, led by industry veteran Bobby Ceklic, has worked together for many years and has developed a smart customer-centric approach that has delivered results for our customers, our employees and our company year over year.

- Describe any special strengths or features that distinguish your services from other organizations – i.e., the value that will be added to the CareerSource Pasco Hernando System through your organization.

New Horizons gives students new opportunities through globally recognized career training programs. We provide industry-leading certifications, training preparation, focused career paths, award winning trainers and the support our clients deserve.

We understand your drive and we are committed to helping you find the right program to elevate your career. From entry level courses to advanced cybersecurity certifications that lead to good paying jobs.

Our placement team works with companies in the area, our state and on national basis. We have an unbelievable network of companies that we not only train their staff but they also hire our graduates because of high quality training. What we bring to the table:

- Curriculum Aligned with Employer's expectations
- In-Person or Online training available
- Mentoring and exam crams
- Free retakes and access to labs
- Experienced Friendly Educators and Counselors
- Programs and Course Flexibility
- Support and Guidance every step
- Placement assistance
- Expert Coaching with a passion for professional development
- Network with Working Professionals throughout training

TABLE OF CONTENTS:

Contents

A. Organizational Experience / Capabilities	6
(1) Describe your organization's specific experience, to include:.....	6
(2) Describe your organization's specific experience	7
B. Service Strategy	11
(1) Describe your organization's understanding of the Pasco and Hernando County	11
(2) Describe your complete staffing plan, to include:	11
5. Budget	13
A. Structure	14
A. Costs:.....	15
B. Support:.....	15
C. Contingency:.....	15
D. Invoice Handling:	16
6. Value Added Services.....	16

4. Proposal Narrative [Note: Using the outline numbering format provided below, ensure that the requirements listed in the Scope of Work are addressed in detail. Clear, thorough, concise answers are requested. Do not repeat statements or ideas within the text of the proposal. Referring the reviewer to another section of the proposal for previously stated information is preferred over repeating the information. **Clarity is the key.**

A. Organizational Experience / Capabilities

Describe the proposing agency's mission and philosophy for management and service delivery, and organizational experience in providing the services proposed, as well as the organization's capabilities to deliver the proposed services by thoroughly responding to the directions below.

- (1) Describe your organization's specific experience, to include:
- The intentions and purpose of your organization, and provide your organization's mission statement.
 - Your philosophy for management and service delivery.
 - Whom you see as your customer(s) in the CareerSource Pasco Hernando System, and define your view of quality service to those customers.

Our typical customer in Pasco Hernando is unemployed, under-employed, low income customers looking for a fresh start, that lacks specific skills or certifications to get the type of job they want to

become self-sufficient and needs to get back to work as soon as possible. Our quality service provides them the following:

- Vendor approved, up-to-date training programs designed to give them the skills and certifications they need in a timely manner. For instance, our Microsoft programs use Microsoft materials, curriculum, Microsoft Certified instructors and Microsoft labs. The same is true for other vendors like Cisco.
- Our programs are designed to be completed in a timely manner so we can go to work more quickly to help them find a job that meets their needs.
- Where available, we give our clients practice exams, labs, exam crams and a test pass guarantee.
- Job placement assistance, including resume, cover letter and LinkedIn profile preparation, as well as assistance getting their applications past the applicant tracking systems. Most importantly, we help our clients get their information in front of the hiring managers.

New Horizons has hundreds of locations in 30 different countries, working with companies, military, and government agencies everywhere that use us for their training. These companies want their employees back as quickly as possible, so we have more experience training people quickly to get them up to speed.

Because we already work with so many employers who use us to train their employees, we have established relationships which help us get our people placed. We offer employers a free service where we send them qualified applicants at no charge. Because of this we receive many job leads that are not advertised, giving our clients a competitive advantage. Even if a job is advertised, the relationships we have with these companies make it easier to make sure the hiring managers get our clients applications.

We have been working with WIOA applicants for many years and have education counselors with many years of experience and expertise who can help both the applicant and the WIOA counselors process the applications more efficiently.

- Any special strengths or features that distinguish your services from other organizations – i.e., the value that will be added to the CareerSource Pasco Hernando System through your organization.
- (2) Describe your organization's specific experience in managing and delivering Workforce Training (i.e. Occupational Skills Training) mentioned in this RFP's Scope of Work. Include in the description the organization's experience and capabilities in:
- Managing and delivering these services in Florida;
 - Managing an integrated multi-funded / multi-program system;
 - Providing business and job-seeker services, including any innovative methods used in the delivery of these services;

New Horizons has been in business for 40 years, specializing in occupational skills training for businesses who need to keep their workforce up-to-date and for individuals looking to either advance their current career or change careers. Our successful approach has allowed us to grow to hundreds of locations in over thirty countries and across six continents and become one of the largest (if not the largest) Microsoft and Cisco certified training partners.

We have been in Florida 25+ years and have become one of the largest training providers for WIOA, Get There Faster, TechBoost, AFCOOL, Army COOL, DOD Skillbridge and other government programs designed to help people get back to work, consistently helping our clients get trained, certified and placed in their fields with the skills they need to be successful. Many of our clients have turned around and come back to us for additional training to advance further in their careers.

We interview each potential applicant to ensure they both qualify and are suitable for the program they are seeking. The in-depth interview allows us to help each potential client gain a better understanding of their career choice and prepare them to do what is needed to succeed.

We strive to give each client the tools they need to learn the skills, pass the exam and get certified. With each class, they get the courseware, but much more:

- Virtual labs so they can practice repeatedly to retain the material.
- Access to a recording of the class for up to six months after they take it, so they can go back and review all or part as needed.
- Practice exams they can take as often as they like. Each time they take the practice exam they get different questions.
- Exam crams. For many classes, we offer an exam cram at no extra charge. An instructor works with several students to help them cram for the exam right before they take it.
- Free retakes. A student can retake any class for free within six months.
- Tutoring as needed, if a student struggles with a class, we can arrange for one of our instructors to spend some time with them to help them get up to speed.
- Test Pass guarantee. We ask each student to do the practice exams first and pass them three times in a row. We then give them a test pass guarantee that if they do not pass the exam the first time, we will pay for another one.

Besides giving our clients the technical skills and certifications they need, we also give them the job-hunting skills to market themselves more effectively to get the job they want. This includes the following:

- Resume writing. We teach our clients not to use a one size fits all approach, but how to tailor their resume and application to fit the job they are applying for. This is critical in order to get past the applicant tracking systems that are prevalent today.
- Cover Letters. When to use them and when not to, then how to write one when it is needed.
- LinkedIn profiles. Since many recruiters use LinkedIn as their primary or exclusive means to filling open positions, an all-star profile is needed to get the most opportunities.

- Mock Interviews. Many of our clients have not been on a job interview in many years, or have limited experience. We conduct mock interviews when needed to make sure each client has the best chance of landing the job they want.
- Job leads. Because of our extensive contacts with employers, we get numerous job leads that are not available to the general public. Our students get job leads others will never see.

NHTB has years of managing and delivering Workforce Training mentioned in this RFP's Scope of Work. Currently working with CS Pinellas, CS Suncoast, CS Hillsborough, CS Pasco Hernando, CS Citrus/Levy/Marion to mention few. In addition to Workforce related (WIOA) funding, we work with the number of State and Federal programs supporting number of vocational rehabilitation candidates going seeking new skills and credentialing.

Our most recent placement is at 82% and student retention/completion is at 100% as reported to State Department of Education CIE. Our placement team provides each candidate with resume service, interview coaching, LinkedIn profile, targeted weekly job leads and personalized search.

Our team is trained to handle any client related scenario and turn those scenarios into a positive student experience. Part of working at NHTB is taking part is our client centric approach and dedication to excellence.

- (3) Provide in table format your organization's experience and capabilities in achieving measurable performance outcomes by identifying goals set (either through a contract, plan, or policy) and providing verifiable performance achievement data against those set goals (training completion rate, job placement rate, average wage at placement, six-month job retention rate, cost per placement, participation rate, job seeker and employer satisfaction rate, etc.). Provide this information for each of the programs mentioned above for each contract held in Florida and in other states during the last 18 months. Provide a contact person, phone number and email address for each such contract.

SEE ATTACHED Performance report spreadsheet for the last 24 months to include avg wage at placement.

(4) Describe your organization's financial and administrative experience and capabilities. Include in that description experience in: • **Managing and accounting for multiple federal, state and local funding sources in accordance with GAAP;** • **Maintaining timely and accurate data in the various MIS systems;** • **Conducting self-monitoring for contract performance and compliance;** • **Developing and implementing a continuous improvement model.**

1. New Horizons of Tampa Bay (NHTB) is 100% owned by Robert J Remington. Remington has been a business owner for 45 years. His first business was a software company that developed an accounting and payroll system for governmental entities. He has extensive experience in dealing with multiple funding sources and tracking same

under the rules of GAAP. NHTB has multiple accounting staff members to meet this need.

2. NHTB has systems in place assuring timely daily and reporting.

3. NHTB has comprehensive self-monitoring systems comprised of accounting and student services staff that work in concert to meet the needs of our students and fiscal agents.

4. NHTB has weekly operations review meetings designed to deal with current challenges and to continuously modify internal procedures to advance our quality standards.

- (4) Identify key staff that will be assigned to work on this project, including the lead for the local operation, describe why these key staff would be successful on this project, and provide copies of their résumés. In addition, describe what further assistance and expertise will be made available by the proposing organization to support these key staff.

Bobby Ceklic – General Manager

Madison Rosa – Director of Career Placement

Kara Brown – Career Placement Coordinator

Yenitza Reyes – Operations Coordinator/Student services admin

Dewey McGuirk – Lead Education Consultant WIOA specialist

For over 35 years, New Horizons has provided more than 30 million students with industry-leading technical training that delivers the most relevant and intuitive computer courses and certifications. NHTB Team has been one of the top training centers in the network for years and has been recognized for its excellence by industry leaders and partners for excellence:

October 2020 - New Horizons Tampa Global Center of The Year!

October 2020 - New Horizons Tampa 5 Star Center Of Excellence Award

April 2019 - New Horizons Tampa North American Regional Center of the Year

April 2019 - New Horizons Tampa 5 Star Center Of Excellence Award

February 2018 - New Horizons Tampa 5 Star Center Of Excellence Award

February 2017 - New Horizons Tampa 5 Star Center Of Excellence Award

This award recognizes New Horizons Tampa as simply the "Best of the Best!"

The prestigious award is given to centers that exhibit outstanding performance

in the areas of:

- Client Satisfaction
- Instructor Performance
- Vendor Authorized Status
- Facility and Learning Environment
- Revenue and Client Acquisition Growth

Additional team members may be assigned to support the project if the leadership determines the need for additional resources.

B. Service Strategy

Through addressing the items below, outline your organization's understanding of the current needs of the local workforce and detail how you plan to deliver the services requested while meeting the service guidelines provided.

- (1) Describe your organization's understanding of the Pasco and Hernando County communities, and the local labor market.

NHTB has been serving Pasco and Hernando communities for years and delivering quality training to various businesses and Government entities from basic Microsoft Office, HR and Leadership or high end Cyber Security related training. Additionally, we have worked with CSPH for years delivering training and job placement services to under-employed, low income and unemployed residents of the Pasco Hernando communities.

- (2) Describe your complete staffing plan, to include:

- Management structure and qualifications of lead staff;

Bobby Ceklic – General Manager

Madison Rosa – Director of Career Placement

Kara Brown – Career Placement Coordinator

Yenitza Reyes – Operations Coordinator/Student services admin

Dewey McGuirk – Lead Education Consultant WIOA specialist

Additional team members will be hired as needed in order to support the contract if awarded. Leadership has decades of industry relevant experience delivering results.

- Brief job descriptions of all staff positions;
resumes attached

- Table of Organization, to include number of positions by location and service delivery function;

Org chart attached and includes positions that are relevant to support and demonstrate our ability to fulfill contract if awarded. NHTB will hire additional team members as needed in order to maintain high level of customer service and achieve operational excellence.

(3) Describe your plan to provide all the services listed in the Scope of Work.

We interview each potential applicant to ensure they both qualify and are suitable for the program they are seeking. The in-depth interview allows us to help each potential client gain a better understanding of their career choice and prepare them to do what is needed to succeed.

We strive to give each client the tools they need to learn the skills, pass the exam and get certified. With each class, they get the courseware, but much more:

- Virtual labs so they can practice repeatedly to retain the material.
- Access to a recording of the class for up to six months after they take it, so they can go back and review all or part as needed.
- Practice exams they can take as often as they like. Each time they take the practice exam they get different questions.
- Exam crams. For many classes, we offer an exam cram at no extra charge. An instructor works with several students to help them cram for the exam right before they take it.
- Free retakes. A student can retake any class for free within six months.
- Tutoring as needed, if a student struggles with a class, we can arrange for one of our instructors to spend some time with them to help them get up to speed.
- Test Pass guarantee. We ask each student to do the practice exams first and pass them three times in a row. We then give them a test pass guarantee that if they do not pass the exam the first time, we will pay for another one.

Besides giving our clients the technical skills and certifications they need, we also give them the job-hunting skills to market themselves more effectively to get the job they want. This includes the following:

- Resume writing. We teach our clients not to use a one size fits all approach, but how to tailor their resume and application to fit the job they are applying for. This is critical in order to get past the applicant tracking systems that are prevalent today.
- Cover Letters. When to use them and when not to, then how to write one when it is needed.
- LinkedIn profiles. Since many recruiters use LinkedIn as their primary or exclusive means to filling open positions, an all-star profile is needed to get the most opportunities.
- Mock Interviews. Many of our clients have not been on a job interview in many years, or have limited experience. We conduct mock interviews when needed to make sure each client has the best chance of landing the job they want.
- Job leads. Because of our extensive contacts with employers, we get numerous job leads that are not available to the general public. Our students get job leads others will never see.

- (4) Describe your plan to establish and maintain a continuous improvement process that includes data collection, reporting, data analysis, and corrective action mechanisms to ensure that performance goals are achieved.

NHTB staff are trained as necessary to effectively carry out all activities contracted; An ongoing training program is in place that focuses on ensuring that team is in-sync and operates at the most optimal level focusing on the mission. Tam is kept abreast of all new information and processes in a timely manner.

Systems are in place to ensure that data collection, reporting, data analysis and any corrective action mechanisms are in place in order to ensure that performance goals are met.

- (5) Include any creative and innovative methods in the delivery of the proposed services.

Training is delivered in-person at our location or fully interactive live online delivery. In addition to training, mentors are available as needed making sure that students are keeping up with the learning plan and staying on track to graduate. Weekly exam crams are available to all students at no cost to help them prepare for industry certification exams. Admissions team and student services are there every step of the way. Training is recorded giving students ability to review and replay training at any time. Students will have access to virtual labs for up to 6 months giving them ability to practice and study at their convenience. Our student retention/course completion is at 100% and speaks to our ability to deliver high quality training in an environment that is consistent with industry best practices.

5. Budget

Budget New Horizons Of Tampa Bay

70Students	@	6,000	420,000
------------	---	-------	---------

Total Revenue	420,000	
Expenses		
Out Reach Costs	17000	4.0%
Admissions Representatives	62000	14.8%
Customer Service	30000	7.1%
Instructors	111000	26.4%
Courseware Materials	28000	6.7%
Certification Preparation	3000	0.7%
Certification Examinations	40000	9.5%
Placement	20000	4.8%
Overhead and Infrastructure	25000	6.0%
Senior Management/Royalties	42000	10.0%
		90.0%

A. Structure

a. Outreach Costs - The number displayed is based on two factors, our experience in the amount of marketing, advertising and fee-based event attendance to generate the appropriate and the current employment demand environment.

b. Admissions Representatives- Our admissions representatives do more than just engage and enroll students. They have an active role throughout the entire training, certification and placement engagement. They are the key connection in transitioning out student to new careers.

c. Customer Service- Customer service personnel bring resources together to provide successful outcomes for our students. In supporting admissions representatives, instructors and placement team members they help create a cohesive, smooth training experience for the student.

d. Instructors- NHTB has a large team of on staff instructors and an large library of "remote" learning curriculum to provide many options for our students and a significant number of events to provide convenient scheduling for our students. FREE retakes are available to all our students if they would like to retake a particular course.

e. Courseware Materials- NHTB has a large number of training partners that provide us with state-of-the-art courseware curriculum, in both elearning and printed options. that are completely aligned with our individual course offerings.

f. Certification Preparation- NHTB offers exam preparation classes and pre-tests that allow the student to practice the testing content and environment before taking the actual test. Many of our students have not been in a learning environment in quite a while. We feel we have a responsibility to our students to get them acclimated to the actual testing environment.

g. Certification Exams- Certifications exam vouchers are provided for each class (that has a test). Certification tells employers that the student has mastered the content of the class.

h. Placement- NHTB has full time placement staff. They will assist the student in resume preparation, practice interviews with tips and help the student secure interviews for positions.

i. Overhead and Infrastructure- NHTB owns it's state of the art facility at 5402 West Laurel Street Tampa, Florida. We have a very sophisticated infrastructure allowing our students to take classes live in class or online.

j. Senior Management/Royalties- Our General Manager, Bobby Ceklic, brings 20 years of training center management to the solution we are offering. Royalties are paid to our franchisor New Horizons Computer Learning Center Worldwide.

- A. Costs: Give details of the organization's cost allocation method if one is used, e.g., prorating the cost of supplies based on the number of staff, or the cost of salaries based on percentage of time spent on this contract. Please be specific.

The cost allocation methodology is based on 5 years of data delivering the same content requested by the Bid. We account for costs exactly as the shown above and analysis was done based on the number of students and funding offered per student. It is also important to note that this Bid requests exactly what we do for our consumer student every day. As a result there is extensive history we can apply to fulfilling this engagement successfully knowing our costs precisely.

- B. Support: Identify any in-kind resources/support for the service delivery system beyond that requested for reimbursement in the budget. Include each committed or proposed source of funding and the amount of that funding.

There are no in-kind resources or support required. The proposed budget is a turn key comprehensive solution.

- C. Contingency: State what contingency plans are in place to repay the PHWB in the event that there are any disallowed costs as a result of an audit or monitoring review.

NHTB always retains a capital reserve for refunds. Secondly NHTB's owner has signed a train out agreement with the CIE which requires him personally to complete all consumer training engagements. We would read this agreement to include your request for contingency refund for disallowed costs.

- D. Invoice Handling: Describe how the proposing agency will financially support the costs of doing business until an invoice can be submitted and paid by PHWB. *Note: No advance payment will be made.*

NHTB rarely receives payment in advance necessitating a significant cash reserve on hand to allow for normal extended terms of payment.

- F. Payment: State what method of payment will be requested, either fixed-unit price or cost-reimbursement with a demonstrated performance basis.

NHTB requests a fixed unit price payment with 50% payment made upon start of training and the remaining portion due at completion of training.

- G. Contract percentage: If funded, what percentage of the proposing agency's total budget will this contract represent?

Based on NHTB's revenues over the last 5 years a contract of this size would be 9.8% of an average year's business. Based on the budget proposed we would expect a gross profit of 10% if awarded the Bid.

- H. Indirect Costs: Describe how the proposer will budget and maximize the total cost of the contract on direct program costs. Describe any indirect costs that are proposed. If an indirect cost rate is utilized, please provide a copy of the indirect cost rate approval letter and the approved rate.

There are no indirect costs associated with this Bid response.

6. Value Added Services – Answer the question: What does your organization bring to the area as a value-added service?

New Horizons gives students new opportunities through globally recognized career training programs. We provide industry-leading certifications, training preparation, focused career paths, award winning trainers and the support our clients deserve.

We understand your drive and we are committed to helping you find the right program to elevate your career. From entry level courses to advanced cybersecurity certifications that lead to good paying jobs.

Our placement team works with companies in the area, our state and on national basis. We have an unbelievable network of companies that we not only train their staff but they also hire our graduates because of high quality training. What we bring to the table:

- Curriculum Aligned with Employer's expectations
- In-Person or Online training available

- Mentoring and exam crams
- Free retakes and access to labs
- Experienced Friendly Educators and Counselors
- Programs and Course Flexibility
- Support and Guidance every step
- Placement assistance
- Expert Coaching with a passion for professional development
- Network with Working Professionals throughout training

Budget New Horizons Of Tampa Bay

70 Students @	6,000	420,000
---------------	-------	---------

Total Revenue	420,000
---------------	---------

Expenses

Out Reach Costs	17000	4.00%
Admissions Representatives	62000	14.80%
Customer Service	30000	7.10%
Instructors	111000	26.40%
Courseware Materials	28000	6.70%
Certification Preparation	3000	0.70%
Certification Examinations	40000	9.50%
Placement	20000	4.80%
Overhead and Infrastructure	25000	6.00%
Senior Management/Royalties	42000	10.00%
		90.00%

2021- 2022	Credential	Clock Hrs	ENROLLMENTS	CONTINUING ENROLLMENT	LED	WITHDRAWALS	GRADUATES
	53922 CyberSecIT	180	27	3		0	24
	53921 Mobile	160	12			0	12
	26224 MOS	72.5	14			0	14
	55404 A+	40	24			0	24
	42001 Cloud+	40	40			0	40
	55409 PMP	72.5	29			0	29
	55403 CCNA	73	24			0	24
	55405 Network+	36.25	31			0	31
	55411 ITIL	24	26			0	26
	55410 CEH	40	22			0	22
	49862 CySA+	40	16	0		0	16
	55406 Security+	36.25	32			0	32
	49865 Penetration Tester	40	19	0		0	19
	53924 Azure Assoc	40	10			0	10
	26227 Internet & Graphics	94.25	1			0	1
	41998 VCP	40	1			0	1
	49861 CAPM	32	1			0	1
			329	3		0	326

2021-2022

2020-2021

Working in Field	Employed	Retention	Employed	Avg wage
16	20	100.00%	83.33%	90k
9	11	100.00%	91.67%	43k
11	11	100.00%	78.57%	46k
19	20	100.00%	83.33%	40k
33	38	100.00%	95.00%	68k
24	24	100.00%	82.76%	86k
20	24	100.00%	100.00%	76k
26	29	100.00%	93.55%	45k
22	24	100.00%	92.31%	65k
19	22	100.00%	100.00%	110k
14	16	100.00%	100.00%	100k
28	31	100.00%	96.88%	55k
17	19	100.00%	100.00%	82k
9	9	100.00%	90.00%	74k
1	1	100.00%	100.00%	85k
1	1	100.00%	100.00%	136k
1	1	100.00%	100.00%	75k
270	301	0	100.00%	92.33%

Placement	Retention
82.82%	100.00%
88.74%	99.70%

New Horizons Tampa Bay - Companies that they have hired our graduates:

References:

Apex Systems

Contact: Joe Barowski

Ph: 813-281-8800

jbarowski@apexsystems.com

NCR

Contact: Tanja Cortan

Ph: 470-321-6832

Tanja.Cortan@ncr.com

Pro Staff Services Group – Contract with Advent Health for IT Support

Contact: Richard Gerola

Ph: 407-330-8335

richard@prostaffservicesgroup.com

WIOA references

Company Name Careersource Tampabay

Contact Person Christian Vaughn

Address 9215 N Florida Ave. Tampa, FL 33612

phone Number (813) 930-7810

Email vaughnsa@careersourcetb.com

Service Dates 6/2022 - present

Reference #2

Company Name Careersource Tampabay

Contact Person Takia Ross

Address 9215 N Florida Ave. Tampa, FL 33612

phone Number (813)-419-5333

Email rosst@careersourcetb.com

Service Dates 10/2022 - present

Reference #3

Lysandra Montijo

Director of Programs

CareerSource Pinellas

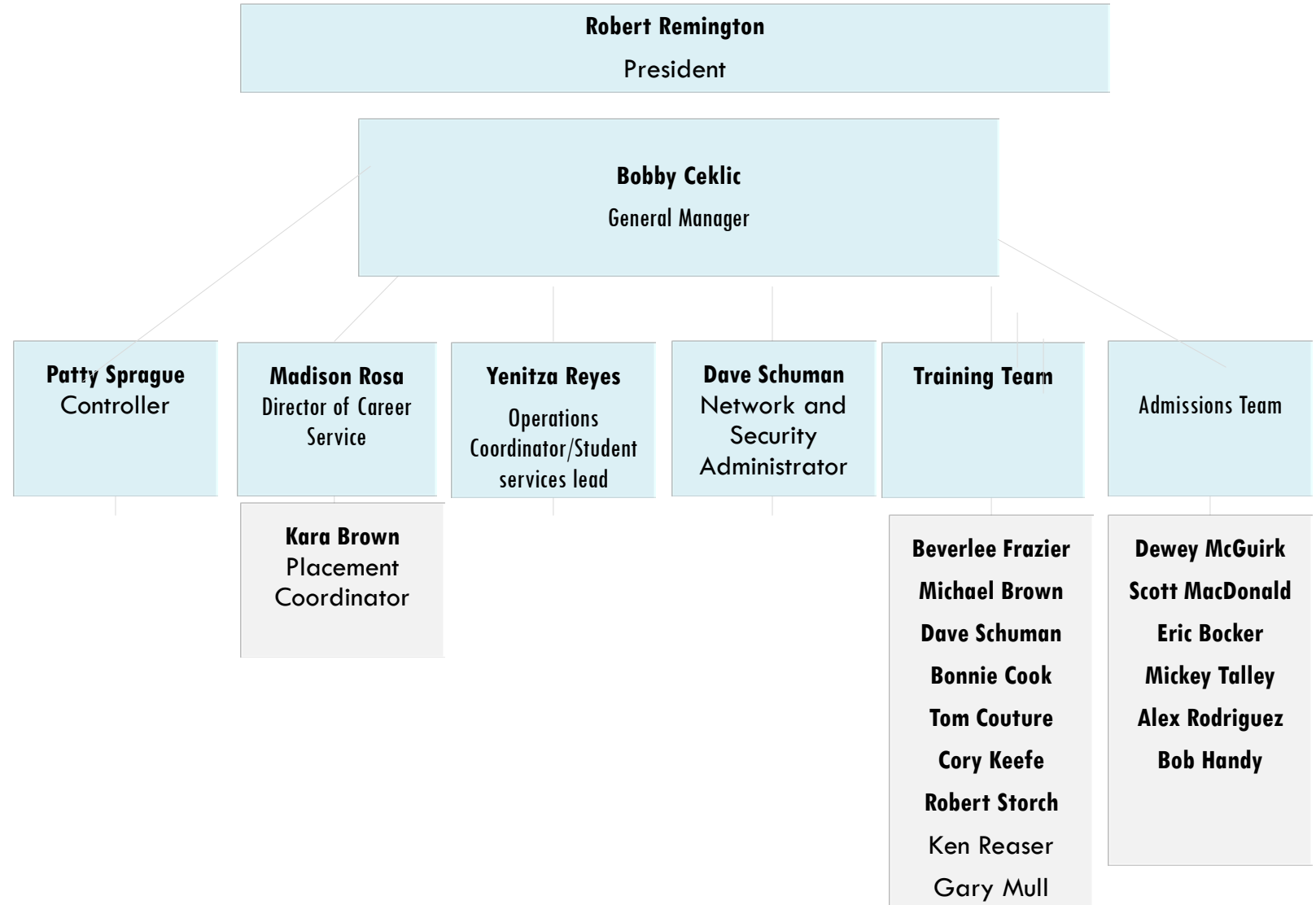
13805 58th Street N., 2-140

Clearwater, FL 33760

lmontijo@careersourcepinellas.com

Tel: 727-608-2475

Service Dates: 10 years - present



Madison Rosa

Wimauma, FL 33598

813-810-8314

merrit6366@gmail.com - <https://www.linkedin.com/in/madisonrosa/>

OBJECTIVE:

Ambitious and detail-oriented professional with 10+ years of experience in administration. A thorough, detail-oriented individual, willing to jump in and assist wherever needed to deliver the results that will contribute to the overall success of the business.

EDUCATION:

B.A. in Psychology Southern New Hampshire University Manchester, NH 2018

SKILLS:

Customer Service | Web and Tech Savvy | Career Services | multi-Tasking | Time Management | Organizational Systems | Work-flow Management | Microsoft Office | Accuracy | Filing | Database Management | Invoice Creation | Detail Oriented | Invoice Tracking | Travel & Accommodations | CRM Software | Interviewing | Records Management | File System Creation | Accounts Payable/Receivable | Resume Writing

PROFESSIONAL EXPERIENCE:

Director of Career Services **New Horizons of Tampa Bay/Orlando** **Tampa, FL** **03/22 – Present**

- Oversee all of Tampa and Orlando New Horizons Students to assist with their job placement and resume.
- Provide comprehensive career advice and educational resources to students of New Horizons
- Coach and assist with job placement, resume, mock interviews, and prepare student for interviews.
- Contact local companies and recruiters to partner and send qualified students once they are trained and certified at our institution.
- Resume writing
- Created a database/CRM with all student's information, resumes, potential jobs.
- Send out daily job opportunities to my students.
- Made goals to get my students placed each month and reported monthly on how many students I was able to place.
- Host virtual career fairs exclusively for my students and local companies in hopes to get my students employed.
- Advanced knowledge in working with all Microsoft Office, Zoom, Teams, etc.

Operations Coordinator **New Horizons of Tampa Bay** **Tampa, FL** **06/15 – 03/22**

- Manage all accounts receivable and accounts payable utilizing MS Excel/QuickBooks.
- Maintain facility equipment including all office and facility supply ordering, courseware inventory, and exam voucher purchasing.

- Coordinate all room rentals for B2B clients while ensuring proper catering order has been made for each event.
- Booked flight/hotel for instructors to travel to other states/cities to host a class and/or event
- Process both credit card and check deposits creating and adjusting invoices as necessary.
- Daily use of MS Office, CRM and LMS databases to ensure class evaluations, class/test scheduling, instructor and employee attendance is accurately documented.
- Accurately update student invoices and ledgers for the VA.
- Certified Pearson VUE and Certiport Proctor for exams following proper testing procedures.
- Manage all inner franchise orders while maintaining a partnership with courseware provider, facility vending machine and coffee display providers.
- Created class schedule for instructors and students.

Enrollment Representative

Bisk Education

Tampa, FL 01/14 – 04/15

- Assist individual students throughout their first day of class along with their experience with USF.
- Manage student database ensuring all data is accurately imported and adjusted when necessary.
- Communicate weekly with each student to ensure the highest satisfaction possible.
- Enroll and adjust student schedules accordingly.
- Help leads who have expressed interest in various degree programs offered.
- Follow up with prospects/students prior to their start dates to ensure proper documents are obtained to begin classes.
- Collect additional documents necessary for the admissions process.
- Accurately document information within company database.

Admissions/Quality Assurance **Columbia Southern University Orange Beach, AL 03/10 – 12/13**

- Organize information sessions for prospects/students by maintaining liaison with other institutes and agencies.
- Assist students throughout the admissions process and provide support for withdrawn students to instill further consideration to return to classes.
- Review and proofread courses, catalogs, and handbooks prior to their initial launch.
- Establish relationships with district schools and universities to request additional documentation necessary for prospects.

K A R A M. B R O W N

Dunedin, FL 34698 jerryinkara98@gmail.com 443-616-4521

Career Coach with 5 years of experience assisting students, military members, and their families achieve career goals. Hard working, understanding, and compassionate individual seeking a position in an organization that would make optimum utilization of my skills, enhance knowledge and contributes to the success of the person and organization; and shared values in a team with mutual respect.

EDUCATION

Bachelor of Science, Alternative Medicine, Everglades University, Tampa, FL 2021

– *Related Courses (4.0 GPA Summa Cum Laude)*

<i>Fundamentals of Nutrition</i>	<i>Herbal Apothecary</i>	<i>Dietary Influences on Disease,</i>
<i>Detoxification and Healing</i>	<i>Naturopathic Medicine</i>	<i>Alternative Approaches to Disease</i>
<i>Antioxidants</i>	<i>Ayurvedic Medicine</i>	<i>Traditional Chinese Medicine</i>

Diploma, EMT-Basic, John C. Calhoun Community College, Decatur, AL 2002

CERTIFICATIONS & LICENSES

Notary Public, State of Florida

Certified Life Coach, Certificate Number RAOVXG99, New Skills Academy

Certified Personal Trainer National Strength Professionals Association

Certified Herbalist

Advanced Biomarker Labs

CPR/AED/ First Aid Certified

Professional Wellness Alliance Licensed Member Practitioner

WORK EXPERIENCE

Career Services	New Horizons	Tampa, FL	2021 – Present
<ul style="list-style-type: none">• Provide direct career counseling and/or career placement assistance to current & previous students• Perform mock interviews and provide information that will assist the student be more successful during the interview process• Revise student resumes based on their newly acquired skills• Establish relationships with companies' recruiters and HR departments and recommend our qualified students to them for possible career placement• Create and manage job fairs virtually with preferred companies, build bridge between company and student for career possibilities			

Employment Coach	Interactive Government Holdings, Inc., Dunedin, FL	2019 - 2021
-------------------------	---	--------------------

- Assisted military families with resume writing, interview skills, and job search techniques
- Established relationships with over 200 corporations who assist veterans with employment
- Connected clients with assistance programs for financial planning, housing, and education
- Design a plan of action for the soldier to accomplish his/her goals for their civilian life
- Planned and executed employment and education fairs

Family Readiness Support Assistant ESC Inc., Pinellas Park, FL 2018 -2019

- Educated military leaders to raise awareness of the family support programs
- Coordinated the formation of Family Readiness Programs in 36 military units
- Recruited, trained, and supported volunteers to manage the programs, using the established communication protocols
- Generated monthly progress reports, family readiness newsletter, and inspectable documents, increasing document readiness from zero to 72% in 8 months

Event Planner/Co-owner K&B Bridals and Event Planning, Bel Air, MD 2009 - 2011

- Founded wedding and events business, including planning services and retail operation
- Established relationships with clients to identify needs and provide an organized approach
- Managed schedules, vendors and support staff for events with budgets from \$10,000 to \$50,000
- Created customer service and style/ design training manual for sales staff

Family Readiness Group Leader United States Army Reserves 1998 – 2018
Alabama/Pennsylvania/Maryland/Florida

- Recruited, trained, and supervised volunteers for military family support programs.
- Managed activities and volunteer programs in five units across four states
- Ensured accuracy of volunteer records to comply with military code and regulations
- Facilitated thorough communication regarding training schedules, resources, and updates

18211 Cypress Cove Ln.
Lutz , FL 33549

Dewey McGuirk
deweymcg@yahoo.com

(702) 513-0011

WORK EXPERIENCE

New Horizons
Education Consultant

6/15/2014 - present

Job responsibilities include:

- Responsible for recruiting qualified applicants for admission.
- Accountable for weekly, monthly and yearly goals
- Expert use of social media to promote New Horizon's offerings.
- Follow up with applicants to ensure their success in obtaining grants, loans or other assistance to start their programs, then help as needed to help them get certified and work with Career Services to help them get placed.

Accomplishments include:

- Top educational consultant for New Horizons Tampa almost every year.
- Award winning representative almost every year
- #2 in the entire company in 2021

Foreign Currency Trading (FOREX)

01/2013 -6/2014

- Self-employed currency trader and software developer for personal use
- Developed and optimized expert advisor software to facilitate trading
- Latest project back-tests show over a 95% win rate with 99.9% tick data
- Currently earning over 6% per month ROI

Job responsibilities include:

- Recruit
- Oversaw hiring of all admissions staff, maintained staffing plans, and conducted the training, development, motivation, and ongoing management of such
- Conducted weekly training sessions for the whole office and daily one on one training sessions and observations for each representative.
- Responsible for conversions of lead to enrollment; and enrollment to new student, as well as for school's clinical and core admissions budget.
- Ensured compliance with all Concorde standards, ethical standards, and compliance with all federal, state and accreditation requirements. Conducted regular training on requirements for all staff.
- Conducted second interviews for all applicants
- Assisted in the selection of students for competitive programs
- Served as a member of the school's management team.

Other duties as assigned.

References are available upon request.

Job responsibilities include:

- Established, forecasted and achieved new student recruitment plans.
- Oversaw hiring of all admissions staff, maintained staffing plans, and conducted the training, development, motivation, and ongoing management of such
- Conducted weekly training sessions for the whole office and daily one on one training sessions and observations for each representative.
- Responsible for conversions of lead to enrollment; and enrollment to new student, as well as for school's clinical and core admissions budget.
- Ensured compliance with all Concorde standards, ethical standards, and compliance with all federal, state and accreditation requirements. Conducted regular training on requirements for all staff.
- Conducted second interviews for all applicants
- Assisted in the selection of students for competitive programs
- Served as a member of the school's management team.
- Other duties as assigned.

Accomplishments include:

- 60% increase in starts over prior year
- Lowest 5 day cancels and reversals in the company, both in total numbers and as a percentage of starts
- 8% increase in start rate over prior year
- Achieved or exceeded 8 out of 12 core budgets for the year, compared to the campus missing every budget before I arrived. Finished the year well over budget.
- Achieved or exceeded 8 out of 9 clinical budgets. The campus missed every clinical budget before I arrived.
- Increase in student recruitment turned a campus around that was losing over \$300,000 to turning a profit within one year

International Academy of Design and Technology

8/2009 – 6/2011

*National Director of Admissions for the Tampa and Orlando campuses and High School
Director of Admissions for the Tampa Campus*

Job responsibilities included:

- Established forecasts and achieved new student recruitment plans for National and International Admissions (NS) for 2 campuses and High School Admissions (HS) for one campus.
- Oversaw hiring of NS and HS admissions staff, maintained staffing plans, and oversaw and assisted in the training, development, motivation, and ongoing management of such staff including semi-annual and annual reviews; new hire and veteran training; ongoing observations; turnover prevention via training and support provided.

- Trained and oversaw specific NS admissions staff for international admissions recruiting and ensured all procedures were followed to get the I-20
- Conducted weekly training sessions for the whole office and daily one on one training sessions and observations for each representative.
- Responsible for conversions of lead to enrollment; and enrollment to new student, as well as for school's NS and HS admissions budgets.
- Ensured compliance with all IADT standards, ethical standards, and compliance with all federal, state and accreditation requirements. Conducted regular training requirements for all staff.
- Other duties as assigned.

Accomplishments include:

- Almost doubled the average weekly enrollments for the office within the first 6 months of starting.
- 139% of start budget for the year
- Increased start rate to almost 70% versus a company standard of 40%
- Increased International admissions by targeting best prospects and increasing start rates.
- Yield (lead to start) was 50% higher than company standard
- Established a presence on the local Air Force base to increase enrollments from military personnel

The Art Institute of Las Vegas
Senior Director of Admissions

1/2007 – 1/2009

Job responsibilities included:

- Established, forecasted and achieved new student and re-admissions recruitment plans for both the Art Institute and the International Culinary School.
- Oversaw both adult and high school teams as well as International admissions
- Oversaw hiring of all admissions staff, maintained staffing plans, and oversaw and assisted in the training, development, motivation, and ongoing management of such staff including monthly, quarterly and annual reviews; new hire and veteran training; ongoing observations; turnover prevention via training and support provided.
- Conducted weekly training sessions for the whole office and daily one on one training sessions and observations for each representative.
- Responsible for local inquiry generation and database marketing and generate marketing plans to support inquiry conversion and applicant lock-in.
- Responsible for conversions of inquiry to applicant; and applicant to new student, as well as for school's admissions budget and monitoring inquiry source results and cost effectiveness.
- Ensured compliance with all Ai standards, ethical standards, and compliance with all federal, state and accreditation requirements. Conducted regular training requirements for all staff.
- Served as a member of the school's Executive Committee.
- Conducted Situational Leadership training for new Director of Admissions.
- Other duties as assigned.

Accomplishments include:

References are available upon request.

- Successfully launched our high school program, resulting in better relationships with the local high schools and school district, bus tours, workshops, scholarships and high school events which we sponsored, articulation agreements and increased presence in the local community. We also implemented out of area Open Houses in targeted markets to increase out of area enrollments from high schools in Reno, Hawaii and other markets
- Increased community presence with participation in local events, scholarships for high school seniors and local military, workshops and sponsorships
- Partnered with international recruiting agencies to increase enrollments and starts from cash students.
- Turned around an admissions department that had been missing starts by between 19 to 31 starts per quarter for the previous three quarters to a 2 year average of 101.7% of plan
- Number one in the system for inquiry conversion for Division 2 schools in 2007
- Number one in the system for start rate of accepted applicants for Division 2 schools in 2007
- Number two in the system for referrals in 2007
- Number one in the system for inquiry conversion for Division 2 schools in 2008
- Number two in the system for largest improvement in high school inquiry conversion in 2008
- Taught a workshop for new admissions managers on situational leadership
- Successfully proposed and initiated the test launch of our auto-dialer program, resulting in increased contact rate and productivity.

EDUCATION

Bachelor of Science in Computer Information Systems

DeVry University

Graduation: October 2002 GPA: 4.00/4.00

Conflict of Interest/Non-Disclosure Statement

RFP # 01-01042023 WIOA AD/DW_WT

I acknowledge that I have been appointed to conduct reviews of proposals received under the solicitation cited above. I have been briefed about my responsibilities relating to conflict of interest and non-disclosure of information obtained during these reviews.

I do not have any conflict of interest, personal or organizational, real or apparent, in participating in this procurement. If during the course of reviewing the proposals received in response to this solicitation, I become aware of an actual or possible conflict of interest, I will notify the person officially heading this procurement and seek advice on withdrawing from the reviewing group.

Further, I will disclose no information obtained in reviewing proposals under this solicitation to anyone not also participating in this review. Specifically, I will not disclose the number of respondents to the solicitation; the names of individuals and organizations that respond; the results of the review; nor will I disclose any information from technical or cost/pricing submissions of these offerors; except to other reviewers officially assigned to this solicitation during appropriately noticed evaluation meetings.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information. But will refer him or her to the person officially heading this procurement, for action consistent with the Florida Public Records Act (Chapter 119, Florida Statutes), and the Federal Freedom of Information Act.

Cheryl A. Goebel

Signature/Date

Cheryl A. Goebel

Printed Name

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: Computer Coach

Rater's Name: Cheryl A. Goebel

Date: 1/31/2023

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	<p>Information not provided</p> <p>Addresses mission, views and value</p> <p>Mission, views and values closely related to PHWB's mission and values</p>	13	
<p>b) Previous specific experience in delivering WIOA and other training services mentioned in RFP</p> <p>Performance results from current or recent contracts</p>	0-20 pts.	<p>No specific experience</p> <p>Experience in 1 or 2 of the listed programs</p> <p>Experience with 3 or more programs</p> <p>Exceptional experience, 5 or more years providing similar services</p> <p>Poor or unrelated performance results</p> <p>Achieved performance standards</p> <p>Exceeded most performance standards</p>	16	

References	0-15	No references Sufficient references Exceptional references provided	14	
Percentage of past students who have gained/retained sustainable employment	0-15		13	
Total Points for This Section			56	
Budget	Max. 35 pts.			
a) Budget narrative The budget narrative incorporates the following: <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs • description of how the organization will support costs 	0-10	Requirements not addressed or poorly addressed Requirements addressed Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided	9	

until invoices are paid • detail of the proposed method of payment				
b) Budget costs: Proposed costs are necessary, allowable, reasonable, and properly supported Proposed profit is reasonable	0-15	Proposed costs not adequately supported Adequate justification provided to support costs; proposed costs are necessary and allowable Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable	14	
c) Administrative and financial management experience and capabilities	0-10	Less than 3 years experience 3 to 5 years of experience More than 5 years experience	9	
Total Points For This Section			32	

RATING SUMMARY – RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: Computer Coach

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	88

COMMENTS: _____

Cheryl A. Goebel

Rater's Signature

1/31/2023

Date

Conflict of Interest/Non-Disclosure Statement

RFP # 01-01042023 WIOA AD/DW_WT

I acknowledge that I have been appointed to conduct reviews of proposals received under the solicitation cited above. I have been briefed about my responsibilities relating to conflict of interest and non-disclosure of information obtained during these reviews.

I do not have any conflict of interest, personal or organizational, real or apparent, in participating in this procurement. If during the course of reviewing the proposals received in response to this solicitation, I become aware of an actual or possible conflict of interest, I will notify the person officially heading this procurement and seek advice on withdrawing from the reviewing group.

Further, I will disclose no information obtained in reviewing proposals under this solicitation to anyone not also participating in this review. Specifically, I will not disclose the number of respondents to the solicitation; the names of individuals and organizations that respond; the results of the review; nor will I disclose any information from technical or cost/pricing submissions of these offerors; except to other reviewers officially assigned to this solicitation during appropriately noticed evaluation meetings.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information. But will refer him or her to the person officially heading this procurement, for action consistent with the Florida Public Records Act (Chapter 119, Florida Statutes), and the Federal Freedom of Information Act.

Bethany Hamm 01/31/2023

Signature/Date

Bethany Hamm

Printed Name

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: Computer Coach TC_____

Rater's Name: Bethany Hamm

Date: 01/31/2023

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	Information not provided Addresses mission, views and value Mission, views and values closely related to PHWB's mission and values	15	CCTC has worked with CSPH for many years. They have always been compliant and accommodating for our customers and Career Managers.
b) Previous specific experience in delivering WIOA and other training services mentioned in RFP Performance results from current or recent contracts	0-20 pts.	No specific experience Experience in 1 or 2 of the listed programs Experience with 3 or more programs Exceptional experience, 5 or more years providing similar services Poor or unrelated performance results Achieved performance standards Exceeded most performance standards	15	CCTC has always provided exceptional service. I have worked with Suzanne Ricci for many years and she as well as her team are well experienced in all program areas for any CareerSource Region.

References	0-15	No references Sufficient references Exceptional references provided	15	Credible References appear to be in order
Percentage of past students who have gained/retained sustainable employment	0-15		15	
Total Points for This Section			60	
Budget	Max. 35 pts.			
<p>a) Budget narrative</p> <p>The budget narrative incorporates the following:</p> <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs • description of how the organization will support costs until invoices are paid • detail of the proposed method of payment 	0-10	<p>Requirements not addressed or poorly addressed</p> <p>Requirements addressed</p> <p>Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided</p>	10	All areas were covered and explained in the RFP Response from CCTC

<p>b) Budget costs:</p> <p>Proposed costs are necessary, allowable, reasonable, and properly supported</p> <p>Proposed profit is reasonable</p>	0-15	<p>Proposed costs not adequately supported</p> <p>Adequate justification provided to support costs; proposed costs are necessary and allowable</p> <p>Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable</p>	10	<p>When addressing incentives for completion of training and gaining employment I do feel the \$325 was a bit elevated.</p>
<p>c) Administrative and financial management experience and capabilities</p>	0-10	<p>Less than 3 years experience</p> <p>3 to 5 years of experience</p> <p>More than 5 years experience</p>	10	
<p>Total Points For This Section</p>			30	

RATING SUMMARY – RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: CCTC

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	90

COMMENTS: CCTC has always when needed by customers or CSPH been available for discussion of training needs as well as communication about customer progress. Given the location however, there are minimal enrollments but expanding on the distance training would be a great idea to assist our customers locally

Bethany Hamm 01/31/2023
Rater's Signature Date

Conflict of Interest/Non-Disclosure Statement

RFP # 01-01042023 WIOA AD/DW_WT

I acknowledge that I have been appointed to conduct reviews of proposals received under the solicitation cited above. I have been briefed about my responsibilities relating to conflict of interest and non-disclosure of information obtained during these reviews.

I do not have any conflict of interest, personal or organizational, real or apparent, in participating in this procurement. If during the course of reviewing the proposals received in response to this solicitation, I become aware of an actual or possible conflict of interest, I will notify the person officially heading this procurement and seek advice on withdrawing from the reviewing group.

Further, I will disclose no information obtained in reviewing proposals under this solicitation to anyone not also participating in this review. Specifically, I will not disclose the number of respondents to the solicitation; the names of individuals and organizations that respond; the results of the review; nor will I disclose any information from technical or cost/pricing submissions of these offerors; except to other reviewers officially assigned to this solicitation during appropriately noticed evaluation meetings.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information. But will refer him or her to the person officially heading this procurement, for action consistent with the Florida Public Records Act (Chapter 119, Florida Statutes), and the Federal Freedom of Information Act.

Digitally signed by Desiree Huff
DN: cn=Desiree Huff, o=CareerSource Pasco Hernando, ou=Recruitment
Coordinator, email=dhuff@careersourcepascoherando.com, c=US
Date: 2023.02.02 09:38:25 -05'00'

Signature/Date

Desiree Huff

Printed Name

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: Computer Coach

Rater's

Name: Desiree Huff

Date: 2/01/2023

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	<p>Information not provided</p> <p>Addresses mission, views and value</p> <p>Mission, views and values closely related to PHWB's mission and values</p>	14	
<p>b) Previous specific experience in delivering WIOA and other training services mentioned in RFP</p> <p>Performance results from current or recent contracts</p>	0-20 pts.	<p>No specific experience</p> <p>Experience in 1 or 2 of the listed programs</p> <p>Experience with 3 or more programs</p> <p>Exceptional experience, 5 or more years providing similar services</p> <p>Poor or unrelated performance results</p> <p>Achieved performance standards</p> <p>Exceeded most performance standards</p>	19	

References	0-15	No references Sufficient references Exceptional references provided	10	
Percentage of past students who have gained/retained sustainable employment	0-15		12	
Total Points for This Section			55	
Budget	Max. 35 pts.			
a) Budget narrative The budget narrative incorporates the following: <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs • description of how the organization will support costs until invoices are paid • detail of the proposed method of payment 	0-10	Requirements not addressed or poorly addressed Requirements addressed Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided	8	

<p>b) Budget costs:</p> <p>Proposed costs are necessary, allowable, reasonable, and properly supported</p> <p>Proposed profit is reasonable</p>	0-15	<p>Proposed costs not adequately supported</p> <p>Adequate justification provided to support costs; proposed costs are necessary and allowable</p> <p>Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable</p>	12	
<p>c) Administrative and financial management experience and capabilities</p>	0-10	<p>Less than 3 years experience</p> <p>3 to 5 years of experience</p> <p>More than 5 years experience</p>	10	
Total Points For This Section			30	

RATING SUMMARY – RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: Computer Coach

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	85

COMMENTS: The Business Impact position may take some time to fill. Will this impact immediate placements after training?

Digitally signed by Desiree Huff
DN: cn=Desiree Huff, o=CareerSource Pasco Hernando, ou=Recruitment
Coordinator, email=dhuff@careersourcepascohernando.com, c=US
Date: 2023.02.02 09:37:04 -05'00'

Rater's Signature

Date _____

Conflict of Interest/Non-Disclosure Statement

RFP # 01-01042023 WIOA AD/DW_WT

I acknowledge that I have been appointed to conduct reviews of proposals received under the solicitation cited above. I have been briefed about my responsibilities relating to conflict of interest and non-disclosure of information obtained during these reviews.

I do not have any conflict of interest, personal or organizational, real or apparent, in participating in this procurement. If during the course of reviewing the proposals received in response to this solicitation, I become aware of an actual or possible conflict of interest, I will notify the person officially heading this procurement and seek advice on withdrawing from the reviewing group.

Further, I will disclose no information obtained in reviewing proposals under this solicitation to anyone not also participating in this review. Specifically, I will not disclose the number of respondents to the solicitation; the names of individuals and organizations that respond; the results of the review; nor will I disclose any information from technical or cost/pricing submissions of these offerors; except to other reviewers officially assigned to this solicitation during appropriately noticed evaluation meetings.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information. But will refer him or her to the person officially heading this procurement, for action consistent with the Florida Public Records Act (Chapter 119, Florida Statutes), and the Federal Freedom of Information Act.

Cheryl A. Goebel

Signature/Date

Cheryl A. Goebel

Printed Name

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: FleetForce Truck Driving School

Rater's Name: Cheryl A. Goebel

Date: 1/31/2023

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	<p>Information not provided</p> <p>Addresses mission, views and value</p> <p>Mission, views and values closely related to PHWB's mission and values</p>	14	
<p>b) Previous specific experience in delivering WIOA and other training services mentioned in RFP</p> <p>Performance results from current or recent contracts</p>	0-20 pts.	<p>No specific experience</p> <p>Experience in 1 or 2 of the listed programs</p> <p>Experience with 3 or more programs</p> <p>Exceptional experience, 5 or more years providing similar services</p> <p>Poor or unrelated performance results</p> <p>Achieved performance standards</p> <p>Exceeded most performance standards</p>	16	

References	0-15	No references Sufficient references Exceptional references provided	13	
Percentage of past students who have gained/retained sustainable employment	0-15		13	
Total Points for This Section			56	
Budget	Max. 35 pts.			
a) Budget narrative The budget narrative incorporates the following: <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs • description of how the organization will support costs 	0-10	Requirements not addressed or poorly addressed Requirements addressed Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided	9	

until invoices are paid • detail of the proposed method of payment				
b) Budget costs: Proposed costs are necessary, allowable, reasonable, and properly supported Proposed profit is reasonable	0-15	Proposed costs not adequately supported Adequate justification provided to support costs; proposed costs are necessary and allowable Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable	13	
c) Administrative and financial management experience and capabilities	0-10	Less than 3 years experience 3 to 5 years of experience More than 5 years experience	9	
Total Points For This Section			31	

RATING SUMMARY – RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: FleetForce Truck Driving School

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	87

COMMENTS: _____

Cheryl A. Goebel

Rater's Signature

1/31/2023

Date

Conflict of Interest/Non-Disclosure Statement

RFP # 01-01042023 WIOA AD/DW_WT

I acknowledge that I have been appointed to conduct reviews of proposals received under the solicitation cited above. I have been briefed about my responsibilities relating to conflict of interest and non-disclosure of information obtained during these reviews.

I do not have any conflict of interest, personal or organizational, real or apparent, in participating in this procurement. If during the course of reviewing the proposals received in response to this solicitation, I become aware of an actual or possible conflict of interest, I will notify the person officially heading this procurement and seek advice on withdrawing from the reviewing group.

Further, I will disclose no information obtained in reviewing proposals under this solicitation to anyone not also participating in this review. Specifically, I will not disclose the number of respondents to the solicitation; the names of individuals and organizations that respond; the results of the review; nor will I disclose any information from technical or cost/pricing submissions of these offerors; except to other reviewers officially assigned to this solicitation during appropriately noticed evaluation meetings.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information. But will refer him or her to the person officially heading this procurement, for action consistent with the Florida Public Records Act (Chapter 119, Florida Statutes), and the Federal Freedom of Information Act.

Bethany Hamm 01/31/2023

Signature/Date

Bethany Hamm

Printed Name

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: Fleet Force _____

Rater's Name: Bethany Hamm

Date: 01/31/2023

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	Information not provided Addresses mission, views and value Mission, views and values closely related to PHWB's mission and values	15	Although CSPH has had limited enrollments with Fleet Force in the WIOA program there is success with completion and placement
b) Previous specific experience in delivering WIOA and other training services mentioned in RFP Performance results from current or recent contracts	0-20 pts.	No specific experience Experience in 1 or 2 of the listed programs Experience with 3 or more programs Exceptional experience, 5 or more years providing similar services Poor or unrelated performance results Achieved performance standards Exceeded most performance standards	15	Given the fact that the Fleet Force location is a little more further to drive for training, it has been proven the place with other CareerSource Regions.

References	0-15	No references Sufficient references Exceptional references provided	15	Credible References appear to be in order
Percentage of past students who have gained/retained sustainable employment	0-15		15	
Total Points for This Section			60	
Budget	Max. 35 pts.			
<p>a) Budget narrative</p> <p>The budget narrative incorporates the following:</p> <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs • description of how the organization will support costs until invoices are paid • detail of the proposed method of payment 	0-10	<p>Requirements not addressed or poorly addressed</p> <p>Requirements addressed</p> <p>Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided</p>	10	All areas were covered and explained in the RFP Response from Fleet Force

<p>b) Budget costs:</p> <p>Proposed costs are necessary, allowable, reasonable, and properly supported</p> <p>Proposed profit is reasonable</p>	0-15	<p>Proposed costs not adequately supported</p> <p>Adequate justification provided to support costs; proposed costs are necessary and allowable</p> <p>Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable</p>	10	<p>When addressing incentives for completion of training and gaining employment I do feel the \$325 was a bit elevated.</p>
<p>c) Administrative and financial management experience and capabilities</p>	0-10	<p>Less than 3 years experience</p> <p>3 to 5 years of experience</p> <p>More than 5 years experience</p>	10	
<p>Total Points For This Section</p>			30	

RATING SUMMARY – RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: Fleet Force Truck Driving School

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	90

COMMENTS: Fleet Force Truck Driving School is technically a “new” training provider in WIOA for Region 16. The enrollments which are minimal are low to over see a success in training, its not a matter of being judgmental but that of substantial evidence given Fleet Force is new to WIOA in Pasco Hernando as a training provider

Bethany Hamm 01/31/2023
Rater’s Signature Date

Conflict of Interest/Non-Disclosure Statement

RFP # 01-01042023 WIOA AD/DW_WT

I acknowledge that I have been appointed to conduct reviews of proposals received under the solicitation cited above. I have been briefed about my responsibilities relating to conflict of interest and non-disclosure of information obtained during these reviews.

I do not have any conflict of interest, personal or organizational, real or apparent, in participating in this procurement. If during the course of reviewing the proposals received in response to this solicitation, I become aware of an actual or possible conflict of interest, I will notify the person officially heading this procurement and seek advice on withdrawing from the reviewing group.

Further, I will disclose no information obtained in reviewing proposals under this solicitation to anyone not also participating in this review. Specifically, I will not disclose the number of respondents to the solicitation; the names of individuals and organizations that respond; the results of the review; nor will I disclose any information from technical or cost/pricing submissions of these offerors; except to other reviewers officially assigned to this solicitation during appropriately noticed evaluation meetings.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information. But will refer him or her to the person officially heading this procurement, for action consistent with the Florida Public Records Act (Chapter 119, Florida Statutes), and the Federal Freedom of Information Act.

Digitally signed by Desiree Huff
DN: cn=Desiree Huff, o=CareerSource Pasco Hernando, ou=Recruitment
Coordinator, email=dhuff@careersourcepascoherando.com, c=US
Date: 2023.02.02 09:09:28 -05'00'

Signature/Date

Desiree Huff

Printed Name

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: Fleet Trucking

Rater's

Name: Desiree Huff

Date: 2/01/2023

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	<p>Information not provided</p> <p>Addresses mission, views and value</p> <p>Mission, views and values closely related to PHWB's mission and values</p>	15	
<p>b) Previous specific experience in delivering WIOA and other training services mentioned in RFP</p> <p>Performance results from current or recent contracts</p>	0-20 pts.	<p>No specific experience</p> <p>Experience in 1 or 2 of the listed programs</p> <p>Experience with 3 or more programs</p> <p>Exceptional experience, 5 or more years providing similar services</p> <p>Poor or unrelated performance results</p> <p>Achieved performance standards</p> <p>Exceeded most performance standards</p>	20	

References	0-15	No references Sufficient references Exceptional references provided	15	
Percentage of past students who have gained/retained sustainable employment	0-15		14	
Total Points for This Section			64	
Budget	Max. 35 pts.			
a) Budget narrative The budget narrative incorporates the following: <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs • description of how the organization will support costs until invoices are paid • detail of the proposed method of payment 	0-10	Requirements not addressed or poorly addressed Requirements addressed Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided	10	

<p>b) Budget costs:</p> <p>Proposed costs are necessary, allowable, reasonable, and properly supported</p> <p>Proposed profit is reasonable</p>	0-15	<p>Proposed costs not adequately supported</p> <p>Adequate justification provided to support costs; proposed costs are necessary and allowable</p> <p>Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable</p>	15	
<p>c) Administrative and financial management experience and capabilities</p>	0-10	<p>Less than 3 years experience</p> <p>3 to 5 years of experience</p> <p>More than 5 years experience</p>	10	
Total Points For This Section			35	

RATING SUMMARY – RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: Fleet Trucking

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	99

COMMENTS: _____

Digitally signed by Desiree Huff
DN: cn=Desiree Huff, o=CareerSource Pasco Hernando, ou=Recruitment
Coordinator, email=dhuff@careersourcepascohernando.com, c=US
Date: 2023.02.02 09:08:16 -05'00'

Rater's Signature

Date

Conflict of Interest/Non-Disclosure Statement

RFP # 01-01042023 WIOA AD/DW_WT

I acknowledge that I have been appointed to conduct reviews of proposals received under the solicitation cited above. I have been briefed about my responsibilities relating to conflict of interest and non-disclosure of information obtained during these reviews.

I do not have any conflict of interest, personal or organizational, real or apparent, in participating in this procurement. If during the course of reviewing the proposals received in response to this solicitation, I become aware of an actual or possible conflict of interest, I will notify the person officially heading this procurement and seek advice on withdrawing from the reviewing group.

Further, I will disclose no information obtained in reviewing proposals under this solicitation to anyone not also participating in this review. Specifically, I will not disclose the number of respondents to the solicitation; the names of individuals and organizations that respond; the results of the review; nor will I disclose any information from technical or cost/pricing submissions of these offerors; except to other reviewers officially assigned to this solicitation during appropriately noticed evaluation meetings.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information. But will refer him or her to the person officially heading this procurement, for action consistent with the Florida Public Records Act (Chapter 119, Florida Statutes), and the Federal Freedom of Information Act.

Cheryl A. Goebel

Signature/Date

Cheryl A. Goebel

Printed Name

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: New Horizons Computer Learning Center of Tampa Bay

Rater's Name: Cheryl A. Goebel

Date: 1/31/2023

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	<p>Information not provided</p> <p>Addresses mission, views and value</p> <p>Mission, views and values closely related to PHWB's mission and values</p>	14	
<p>b) Previous specific experience in delivering WIOA and other training services mentioned in RFP</p> <p>Performance results from current or recent contracts</p>	0-20 pts.	<p>No specific experience</p> <p>Experience in 1 or 2 of the listed programs</p> <p>Experience with 3 or more programs</p> <p>Exceptional experience, 5 or more years providing similar services</p> <p>Poor or unrelated performance results</p> <p>Achieved performance standards</p> <p>Exceeded most performance standards</p>	15	

References	0-15	No references Sufficient references Exceptional references provided	0	
Percentage of past students who have gained/retained sustainable employment	0-15		14	
Total Points for This Section			43	
Budget	Max. 35 pts.			
a) Budget narrative The budget narrative incorporates the following: <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs • description of how the organization will support costs 	0-10	Requirements not addressed or poorly addressed Requirements addressed Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided	9	

until invoices are paid • detail of the proposed method of payment				
b) Budget costs: Proposed costs are necessary, allowable, reasonable, and properly supported Proposed profit is reasonable	0-15	Proposed costs not adequately supported Adequate justification provided to support costs; proposed costs are necessary and allowable Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable	12	
c) Administrative and financial management experience and capabilities	0-10	Less than 3 years experience 3 to 5 years of experience More than 5 years experience	9	
Total Points For This Section			30	

RATING SUMMARY – RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: New Horizons Computer Learning Center of Tampa Bay

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	73

COMMENTS: N/A

Cheryl A. Goebel

1/31/2023

Rater's Signature

Date

Conflict of Interest/Non-Disclosure Statement

RFP # 01-01042023 WIOA AD/DW_WT

I acknowledge that I have been appointed to conduct reviews of proposals received under the solicitation cited above. I have been briefed about my responsibilities relating to conflict of interest and non-disclosure of information obtained during these reviews.

I do not have any conflict of interest, personal or organizational, real or apparent, in participating in this procurement. If during the course of reviewing the proposals received in response to this solicitation, I become aware of an actual or possible conflict of interest, I will notify the person officially heading this procurement and seek advice on withdrawing from the reviewing group.

Further, I will disclose no information obtained in reviewing proposals under this solicitation to anyone not also participating in this review. Specifically, I will not disclose the number of respondents to the solicitation; the names of individuals and organizations that respond; the results of the review; nor will I disclose any information from technical or cost/pricing submissions of these offerors; except to other reviewers officially assigned to this solicitation during appropriately noticed evaluation meetings.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information. But will refer him or her to the person officially heading this procurement, for action consistent with the Florida Public Records Act (Chapter 119, Florida Statutes), and the Federal Freedom of Information Act.

Bethany Hamm 01/31/2023

Signature/Date

Bethany Hamm

Printed Name

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: New Horizons _____ **Rater's Name:** Bethany Hamm

Date: 01/31/2023

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	<p>Information not provided</p> <p>Addresses mission, views and value</p> <p>Mission, views and values closely related to PHWB's mission and values</p>	15	I have always found NH to provide quality candidates for training and most helpful with information to get the customer employed.
<p>b) Previous specific experience in delivering WIOA and other training services mentioned in RFP</p> <p>Performance results from current or recent contracts</p>	0-20 pts.	<p>No specific experience</p> <p>Experience in 1 or 2 of the listed programs</p> <p>Experience with 3 or more programs</p> <p>Exceptional experience, 5 or more years providing similar services</p> <p>Poor or unrelated performance results</p> <p>Achieved performance standards</p> <p>Exceeded most performance standards</p>	15	Rated 15 only because NH doesn't fully understand Suitability. They do understand however eligibility and if not sure will always request information and or provide contact information to the potential customer for contact.

References	0-15	No references Sufficient references Exceptional references provided	15	
Percentage of past students who have gained/retained sustainable employment	0-15		15	
Total Points for This Section			60	
Budget	Max. 35 pts.			
<p>a) Budget narrative</p> <p>The budget narrative incorporates the following:</p> <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs • description of how the organization will support costs until invoices are paid • detail of the proposed method of payment 	0-10	<p>Requirements not addressed or poorly addressed</p> <p>Requirements addressed</p> <p>Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided</p>	10	All areas were covered and explained in the RFP Response from NH

<p>b) Budget costs:</p> <p>Proposed costs are necessary, allowable, reasonable, and properly supported</p> <p>Proposed profit is reasonable</p>	0-15	<p>Proposed costs not adequately supported</p> <p>Adequate justification provided to support costs; proposed costs are necessary and allowable</p> <p>Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable</p>	15	
<p>c) Administrative and financial management experience and capabilities</p>	0-10	<p>Less than 3 years experience</p> <p>3 to 5 years of experience</p> <p>More than 5 years experience</p>	10	
Total Points For This Section			35	

RATING SUMMARY – RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: New Horizons

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	95

COMMENTS: In Workforce Programs I have worked very closely as a Case Manager, Auditor and Program Manager with New Horizons. They have always been accommodating and responsive with help needed for the customer or the Case Manager.

 Bethany Hamm
Rater's Signature

01/31/2023
Date

Conflict of Interest/Non-Disclosure Statement

RFP # 01-01042023 WIOA AD/DW_WT

I acknowledge that I have been appointed to conduct reviews of proposals received under the solicitation cited above. I have been briefed about my responsibilities relating to conflict of interest and non-disclosure of information obtained during these reviews.

I do not have any conflict of interest, personal or organizational, real or apparent, in participating in this procurement. If during the course of reviewing the proposals received in response to this solicitation, I become aware of an actual or possible conflict of interest, I will notify the person officially heading this procurement and seek advice on withdrawing from the reviewing group.

Further, I will disclose no information obtained in reviewing proposals under this solicitation to anyone not also participating in this review. Specifically, I will not disclose the number of respondents to the solicitation; the names of individuals and organizations that respond; the results of the review; nor will I disclose any information from technical or cost/pricing submissions of these offerors; except to other reviewers officially assigned to this solicitation during appropriately noticed evaluation meetings.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information. But will refer him or her to the person officially heading this procurement, for action consistent with the Florida Public Records Act (Chapter 119, Florida Statutes), and the Federal Freedom of Information Act.

Digitally signed by Desiree Huff
DN: cn=Desiree Huff, o=CareerSource Pasco Hernando, ou=Recruitment
Coordinator, email=dhuff@careersourcepascohernando.com, c=US
Date: 2023.02.03 08:27:33 -05'00'

Signature/Date

Desiree Huff

Printed Name

PROPOSAL RATING SHEET: RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: NHTB

Rater's

Name: Desiree Huff

Date: 2/03/2023

EVALUATION CRITERIA	POINT RANGE	RATING GUIDE	POINTS AWARDED	COMMENTS
1. Organization Experience Capabilities / Capacity	Max. 65 pts.			
a) Mission, views on quality & customer service, value added by organization	0-15 pts.	<p>Information not provided</p> <p>Addresses mission, views and value</p> <p>Mission, views and values closely related to PHWB's mission and values</p>	10	
<p>b) Previous specific experience in delivering WIOA and other training services mentioned in RFP</p> <p>Performance results from current or recent contracts</p>	0-20 pts.	<p>No specific experience</p> <p>Experience in 1 or 2 of the listed programs</p> <p>Experience with 3 or more programs</p> <p>Exceptional experience, 5 or more years providing similar services</p> <p>Poor or unrelated performance results</p> <p>Achieved performance standards</p> <p>Exceeded most performance standards</p>	15	

References	0-15	No references Sufficient references Exceptional references provided	10	
Percentage of past students who have gained/retained sustainable employment	0-15		10	
Total Points for This Section			45	
Budget	Max. 35 pts.			
a) Budget narrative The budget narrative incorporates the following: <ul style="list-style-type: none"> • specific details of method of calculation • justification of proposed expenditures • cost allocation methodology • any in-kind costs • contingency plans for repayment of disallowed costs • description of how the organization will support costs until invoices are paid • detail of the proposed method of payment 	0-10	Requirements not addressed or poorly addressed Requirements addressed Proposed expenditures justified and details of method of computation provided, cost allocation methodology and payment method clearly explained, in-kind costs provided	7	

<p>b) Budget costs:</p> <p>Proposed costs are necessary, allowable, reasonable, and properly supported</p> <p>Proposed profit is reasonable</p>	0-15	<p>Proposed costs not adequately supported</p> <p>Adequate justification provided to support costs; proposed costs are necessary and allowable</p> <p>Proposed costs are necessary, allowable and reasonable, profit is reasonable, total cost of project is reasonable</p>	11	
<p>c) Administrative and financial management experience and capabilities</p>	0-10	<p>Less than 3 years experience</p> <p>3 to 5 years of experience</p> <p>More than 5 years experience</p>	9	
Total Points For This Section			27	

RATING SUMMARY – RFP # 01-01042023 WIOA AD/DW_WT

PROPOSER: _NHTB_____

EVALUATION CRITERIA	MAXIMUM POINTS	POINTS AWARDED
1. Experience/Capabilities/References	100	72

COMMENTS: _____

Digitally signed by Desiree Huff
DN: cn=Desiree Huff, o=CareerSource Pasco Hernando, ou=Recruitment Coordinator,
email=dhuff@careersourcepascohermando.com, c=US
Date: 2023.02.03 08:22:43 -05'00'

Rater's Signature

Date

ACTION ITEM 4

Training Services – Computer Coach Training Center

The Pasco-Hernando Workforce Board, Inc. (PHWB) has issued a Request for Proposal (RFP) to solicit organizations with the expertise and demonstrated capacity to recruit and provide Occupational Skills Training that results in permanent employment at or above \$15.50/per hour. The training sought is in Information Technology, Healthcare, Construction and/or Warehousing & Transportation occupational sectors. Training is to average 12 weeks in duration and not exceed 16 weeks, in order to effectively and efficiently provide training and training related services in Pasco and Hernando counties using Workforce Innovation and Opportunity Act (WIOA) funds. Services are to be provided from mid-February 2023 through June 30, 2023. PHWB reserves the option to extend any contract awarded for two additional one-year periods contingent on funding availability.

The following training providers submitted proposals to RFP # 01-01042023 WIOA AD/DW WT:

- Computer Coach Training Center
- Fleet Force Truck Driving School
- New Horizons – Tampa

Three PHWB management staff were selected to rate the submitted proposals. Proposals and rating sheets are included for review. Staff would like to enter into contracts with Fleet Force Truck Driving School and Computer Coach as they scored the highest and had the most informative proposals. New Horizons' proposal lacked attention to detail, formatting, and consistency. Both providers will be eligible to renew contract for up to two additional years if performance is met and contingent upon funding availability.

FOR CONSIDERATION

Approval to enter into a contract for Short Term Training Services with Computer Coach Training Center in the amount up to \$100,000 if all terms in contract are met.

Provider:	Training Sector:	Budget:	Total In-Kind Resources:	Number of Trainees:	Length of Training:	Certification/ Program:	Average Score:	Notes:
Computer Coach	Information Technology	\$400,000	\$102,080	56	4-12 weeks	Help Desk Tech, Digital Mktg, Business Project Specialist, Data Analyst, Business Analyst, Front End Development, Cybersecurity Specialist	88	
Fleet Force	Warehousing & Transportation	\$500,000	\$545,000	83	200 hours	CDL A or CDL B	92	Provider has requested additional job placement at \$325/completed participant amount not included in budget.
New Horizons	Information Technology	\$420,000	# not clear	70		Microsoft Office, HR & Leadership, Cyber Security	80	

Provider:	Beth's Rating:	Cheryl's Rating:	Desiree's Rating:	Average:
Computer Coach	90	88	85	87.66666667
Fleet Force	90	87	99	92
New Horizons	95	73	72	80

ACTION ITEM 5

Transfer of WIOA Dislocated Workers Funding to WIOA Adult Funds

The Department of Economic Opportunity, Administrative policy # 118 requires board approval to transfer funds between Dislocated Workers and Adult funding streams. Transferring these funds are to utilize 2021 funding, which will expire on June 30, 2023 from Dislocated Workers to Adult. We will have current year funding, in addition to next program years allocation to serve customers at the same level as we have in the past.

FOR CONSIDERATION

To approve the transfer of WIOA Dislocated Workers fund to WIOA Adult funds to exhaust WIOA DW funding for the period ending June 30, 2023.

Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs
From July 1, 2022 through June 30, 2023

LWDB Number and Name (Requestor): 16, Pasco Hernando Workforce Board, Inc

Name / Title of Requestor Representative: Jerome Salatino, CEO

Adult and Dislocated Worker Transfer Request

Program Year	Program	Total Award Amount	Amount of Adult Requested to be Spent on DW	Percentage of Adult Requested to be Spent on DW	Amount of DW Requested to be Spent on Adult	Percentage of DW Requested to be Spent on Adult
2022-2023	WIOA - DW	1,064,779.00	0.00	0	500,000.00	47%

COMPLETE THE BELOW SECTIONS FOR REQUESTS THAT EXCEED 25% OF THE PROGRAM'S ANNUAL ALLOCATION

Reason for requesting the use of one program's funding for the other (e.g. anticipated depletion of current funds, changes in labor market conditions, etc.):

Transfer older DW funds to Adult to utilize total funding before expiration of NFA

A description of outreach/marketing activities conducted to ensure underserved populations were aware of available services:

We have information on our website, Pasco Economic Development Council, Social Media, Business Services team outreach

Labor market conditions contributing to the need for the transfer:

Lower than normal unemployment claims and the emergency/surge of the gig economy

The number of participants originally planned to be served by the base allocation compared to the estimated number of participants expected to be served after funds are transferred.

This has been a recurring process, to transfer DW funds to AD before expiration of NFA. We have served 79 DW clients, and expended \$245,585 in ITA's over the two year period in DW, and 169 clients and expended \$314,952 in ITA's, in AD for same period. We expect to continue serving clients at the same level, or as need demands, as we have been over the past 2 years. The decline in DW being served has to do with the unemployment being so low, not due to funding transfers.

COMPLETE THE BELOW CERTIFICATION FOR REQUESTS THAT EXCEED 25% OF THE PROGRAM'S ANNUAL ALLOCATION

I certify the following:

1. When transferring from Adult to Dislocated Worker - The LWDB has sufficient funds to serve the WIOA Adult priority populations.
2. When transferring from Dislocated Worker to Adult - The LWDB has sufficient Dislocated Worker funds to serve dislocated workers in the local area; there are no pending layoffs that may impact the need for dislocated workers in the local area.
3. The full board voted to approve this request to transfer funds and a copy of the LWDB's meeting minutes are included with this request.

I certify the above information is true and correct.

Signature of Board Chair

Charles Gibson, Chairman
Print Name

2/16/2023
Date

ACTION ITEM 6

Additional Key Positions

To ensure a continuity of services and fiscal responsibility, additional key positions have been identified and determined critical to provide organizational stability through the Critical Service Period of January 1, 2023, through June 30, 2023, for a maximum time of 20 weeks as suggested per policy:

1. Finance Manger
2. Director of Program Planning and Development

Should an organizational restructuring occur, fitting the criteria listed in the Layoff, Recall and Retention Agreement Policy, the following agreements, drafted by our attorney, shall become effective to provide consistency and stability during the organizational change.

The total financial impact for all new and previously approved key positions will not exceed the originally approved \$284,000 which equals salaries and applicable benefits. Due to other programs, which extend beyond June 30, 2023, closeout may be extended beyond June 30 and employment arrangements will be made at that time.

FOR CONSIDERATION

Approval of Finance Manager and Director of Program Planning and Development as additional key positions.

INFORMATION ITEM 1
Financial Reports

The following item is presented as information for the Committee.

No action is required.

Pasco Hernando WFB 16
Statement of Financial Position - Unposted Transactions Included In Report
As of 12/31/2022
(In Whole Numbers)

	Beginning Year Balance	Current Year Balance	YTD Change	YTD % Change
Assets				
Current Assets				
Cash - Operating	720,357.00	45,556.00	(674,802.00)	(93.68)
Cash - Corporate Unrestricted	53,610.00	53,610.00	0.00	0.00
Cash - Money Market	52,860.00	52,862.00	3.00	0.01
Cash - Payroll	4,872.00	(22,789.00)	(27,661.00)	(567.74)
BB&T Banking Solutions	805,878.00	805,798.00	(80.00)	(0.01)
Prepaid Expenses	82,617.00	13,519.00	(69,098.00)	(83.64)
Deposits	46,369.00	46,369.00	0.00	0.00
Accounts Receivable	0.00	2,849.00	2,849.00	100.00
Grants Receivable	445,286.00	0.00	(445,286.00)	(100.00)
Employee Benefit Receivables	770.00	770.00	0.00	0.00
Total Current Assets	2,212,619.00	998,545.00	(1,214,074.00)	(54.87)
Long-term Assets				
Accumulated Depreciation	(95.00)	(95.00)	0.00	0.00
Total Long-term Assets	(95.00)	(95.00)	0.00	0.00
Total Assets	<u>2,212,524.00</u>	<u>998,450.00</u>	<u>(1,214,074.00)</u>	<u>(54.87)</u>
Liabilities				
Short-term Liabilities				
Sales Tax Payable	0.00	0.00	0.00	0.00
Accounts Payable - Vendors	123,048.00	227,488.00	104,440.00	84.88
Accrued Expenses	106,138.00	0.00	(106,138.00)	(100.00)
Contracts Payable	327,193.00	276,828.00	(50,365.00)	(15.39)
Benefits Payable	2,758.00	1,996.00	(762.00)	(27.63)
401K Traditional	0.00	0.00	0.00	100.00
Payroll Taxes Payable	0.00	32.00	32.00	100.00
Workers Comp Liability	(3,070.00)	5,023.00	8,094.00	(263.60)
Accrued Wages	48,701.00	0.00	(48,701.00)	(100.00)
Accrued Leave	54,004.00	54,004.00	0.00	0.00
Non -Current Accrued Compensated Balances	306,019.00	153,811.00	(152,208.00)	(49.74)
Accrued Payroll Taxes	31,798.00	16,512.00	(15,286.00)	(48.07)
Accrued Pension	17,662.00	10,712.00	(6,950.00)	(39.35)
Deferred Grant Revenue	133,427.00	0.00	(133,427.00)	(100.00)
Total Short-term Liabilities	<u>1,147,678.00</u>	<u>746,406.00</u>	<u>(401,272.00)</u>	<u>(34.96)</u>
Total Liabilities	<u>1,147,678.00</u>	<u>746,406.00</u>	<u>(401,272.00)</u>	<u>(34.96)</u>
Net Assets				
Total Net Assets	<u>1,064,846.00</u>	<u>252,044.00</u>	<u>(812,802.00)</u>	<u>(76.33)</u>
Total Liabilities and Net Assets	<u>2,212,524.00</u>	<u>998,450.00</u>	<u>(1,214,074.00)</u>	<u>(54.87)</u>

Pasco Hernando WFB 16
Statement of Revenues and Expenditures - Unposted Transactions included In Report
From 7/1/2022 Through 12/31/2022
(In Whole Numbers)

	Current Period Budget - Original	Current Year Actual	Percent Total Budget Remaining - Original
Operating Revenue			
Grant Revenue	11,640,390.00	3,448,395.00	(70)%
Pasco County BCC	1,409,364.00	97,261.00	(93)%
Ticket to Work	45,000.00	15,304.00	(66)%
Tobacco Free America	55,000.00	4,510.00	(92)%
Other Income	50,000.00	0.00	(100)%
Total Operating Revenue	<u>13,199,754.00</u>	<u>3,565,469.00</u>	<u>(73)%</u>
 Total Revenue	 <u>13,199,754.00</u>	 <u>3,565,469.00</u>	 <u>(73)%</u>
Expenditures			
Personnel Expenses	5,528,362.00	2,030,493.00	63 %
Allocation Costs	0.00	0.00	0 %
Insurance	105,000.00	43,080.00	59 %
One Stop Operator	21,000.00	10,399.00	50 %
Program Expenses	5,012,900.00	1,646,402.00	67 %
Professional Fees	273,622.00	152,517.00	44 %
Supplies	122,250.00	70,192.00	43 %
Telephone	109,241.00	42,406.00	61 %
Postage & Shipping	8,600.00	429.00	95 %
Occupancy	519,800.00	176,794.00	66 %
Maintenance & Repairs	47,950.00	34,785.00	27 %
Equipment Rental	38,550.00	18,937.00	51 %
Travel & Training	48,050.00	35,047.00	27 %
Dues & Subscriptions	1,100.00	635.00	42 %
Outreach	25,500.00	4,995.00	80 %
Equipment < \$5,000 capital threshold	19,500.00	89,010.00	(356)%
Capital Expenditures	<u>22,150.00</u>	<u>22,150.00</u>	<u>0 %</u>
Total Expenditures	<u>11,903,575.00</u>	<u>4,378,271.00</u>	<u>63 %</u>
 Net Revenue Over Expenditures	 <u>1,296,179.00</u>	 <u>(812,802.00)</u>	 <u>(163)%</u>

NOTES:

Postage & Shipping We were refunded for closing one of our mailboxes

Equipment < \$5,000 When budget was prepared we did not anticipate needing to replace
the amount of laptops and resource room computers
We also received approval to upgrade our email security and icloud backup.
This will be an additional \$24,000

Pasco Hernando WFB 16

Statement of Activities -

Unposted Transactions Included

From 7/1/2022 Through 12/31/2022

(In Whole Numbers)

	Apprenticeship	Corporate	PCBCC	Indirect Pool	NCPEP	Costs	RESEA	SNAP	VETS	Wagner Peyser	WIOA AD
Revenue											
Grant Revenue.	0.00	0.00	0.00	0.00	351,189.00	0.00	112,038.00	69,098.00	76,766.00	373,677.00	484,420.00
Other Revenue	0.00	19,814.00	97,261.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Revenue	0.00	19,814.00	97,261.00	0.00	351,189.00	0.00	112,038.00	69,098.00	76,766.00	373,677.00	484,420.00
Expenditures											
Personnel	488.00	1,100.00	149,252.00	315,430.00	7,789.00	877,444.00	66,280.00	31,089.00	12,229.00	40,025.00	149,339.00
Program Expenses	0.00	0.00	6,000.00	0.00	804,493.00	0.00	0.00	0.00	0.00	0.00	213,640.00
Professional Services	0.00	1,968.00	879.00	30,973.00	373.00	107,692.00	529.00	271.00	111.00	457.00	937.00
One Stop Operator	0.00	0.00	0.00	0.00	0.00	10,399.00	0.00	0.00	0.00	0.00	0.00
Insurance	0.00	0.00	0.00	699.00	0.00	42,381.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00	326.00	0.00	7,380.00	0.00	5,246.00	0.00	0.00	5,260.00	14,999.00	1,836.00
Leases	0.00	0.00	0.00	3,167.00	0.00	150,888.00	0.00	0.00	0.00	0.00	0.00
Utilities & other Facility Costs	0.00	0.00	0.00	1,329.00	0.00	19,626.00	0.00	0.00	0.00	0.00	0.00
Software License renewals	0.00	0.00	278.00	6,761.00	0.00	42,989.00	0.00	22.00	0.00	0.00	2,536.00
Communications	0.00	0.00	308.00	2,140.00	0.00	36,262.00	0.00	0.00	2,467.00	0.00	615.00
Repairs and Maintenance	0.00	0.00	0.00	594.00	0.00	33,876.00	0.00	0.00	0.00	115.00	0.00
Office Expenses	0.00	635.00	12.00	332.00	0.00	1,946.00	51.00	6.00	0.00	0.00	0.00
Outreach	0.00	2,040.00	0.00	579.00	0.00	2,376.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	0.00	1,015.00	4,160.00	0.00	93,806.00	0.00	1,015.00	4,060.00	0.00	1,522.00
Indirect Costs	129.00	290.00	30,539.00	(373,543.00)	2,055.00	0.00	29,905.00	10,651.00	44,253.00	26,208.00	50,525.00
Program Costs Pool	199.00	449.00	14,389.00	0.00	3,180.00	(620,577.00)	37,316.00	16,152.00	15,423.00	53,867.00	64,009.00
Business Services Pool	0.00	0.00	0.00	0.00	0.00	(298,399.00)	26,028.00	11,123.00	0.00	0.00	58,645.00
One Stop Cost Pool	5.00	12.00	1,293.00	0.00	87.00	(505,955.00)	1,266.00	1,828.00	1,873.00	442,983.00	2,139.00
Total Expenditures	821.00	6,820.00	203,966.00	0.00	817,977.00	0.00	161,374.00	72,156.00	85,676.00	578,654.00	545,744.00

Pasco Hernando WFB 16

Statement of Activities -

Unposted Transactions Included

From 7/1/2022 Through 12/31/2022

(In Whole Numbers)

	Apprenticeship	WIOA DW	WIOA NEG	& Incentives	WIOA Youth	Transition	TAA
Revenue							
Grant Revenue.	0.00	345,000.00	50,586.00	33,144.00	386,798.00	1,153,349.00	12,330.00
Other Revenue	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
Total Revenue	<u>0.00</u>	<u>345,000.00</u>	<u>50,586.00</u>	<u>33,144.00</u>	<u>386,798.00</u>	<u>1,153,349.00</u>	<u>12,330.00</u>
Expenditures							
Personnel	488.00	77,664.00	15,974.00	34,474.00	35,207.00	216,708.00	0.00
Program Expenses	0.00	144,643.00	1,882.00	0.00	430,608.00	44,987.00	148.00
Professional Services	0.00	1,244.00	98.00	116.00	1,409.00	5,458.00	0.00
One Stop Operator	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Leases	0.00	0.00	0.00	0.00	19,465.00	0.00	0.00
Utilities & other Facility Costs	0.00	0.00	0.00	0.00	1,258.00	0.00	0.00
Software License renewals	0.00	7,572.00	0.00	0.00	28.00	8,018.00	56.00
Communications	0.00	0.00	0.00	0.00	615.00	0.00	0.00
Repairs and Maintenance	0.00	0.00	0.00	0.00	200.00	0.00	0.00
Office Expenses	0.00	0.00	0.00	0.00	0.00	12.00	0.00
Outreach	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	1,522.00	0.00	0.00	2,030.00	2,030.00	0.00
Indirect Costs	129.00	26,276.00	4,214.00	9,094.00	10,053.00	128,972.00	379.00
Program Costs Pool	199.00	63,794.00	6,521.00	14,073.00	13,025.00	317,602.00	579.00
Business Services Pool	0.00	30,499.00	0.00	0.00	4,803.00	167,301.00	0.00
One Stop Cost Pool	<u>5.00</u>	<u>1,112.00</u>	<u>178.00</u>	<u>385.00</u>	<u>1,220.00</u>	<u>51,526.00</u>	<u>47.00</u>
Total Expenditures	<u>821.00</u>	<u>354,327.00</u>	<u>28,868.00</u>	<u>58,142.00</u>	<u>519,922.00</u>	<u>942,614.00</u>	<u>1,209.00</u>