



## **Eastern CT Workforce Investment Board**

### **Request for Proposals**

**Workforce Innovation and Opportunity Act**

**Title 1 Career Services for Adults, Dislocated Workers,**

**Youth and Jobs First Employment Services**

**FY 2025 - 2026**

**August 2025**

## REQUEST FOR PROPOSALS

Submission Due Date:	September 12, 2025 @ 4:00 p.m.*
Intent to Fund Notification Date:	December 2025
Funding Start-Up Date:	January 1, 2026
Eastern CT Workforce Investment Board Office Location: Franklin, CT 06254	108 New Park Avenue
Contact Person:	Carol LaBelle Sr. Director of Programs & Special Projects
Telephone Number:	(860) 859-4100 ext. 122
Invitation to Bid:	Letters of Intent to Bid are <b><u>required</u></b> and must be submitted by <b>August 15, 2025</b> . Letters should be addressed to Carol LaBelle, Sr. Director of Programs & Special Projects, 108 New Park Ave., Franklin, CT 06254, e-mailed to <a href="mailto:labellec@ewib.org">labellec@ewib.org</a> , or faxed (860) 859-4110.
Proposers Questions:	The Proposers questions, as it relates to the contents of this Request for Proposal, must be <b>submitted not later than August 15, 2025</b> , via e-mail to <a href="mailto:labellec@ewib.org">labellec@ewib.org</a> . <b>Proposers are responsible for checking the website for responses. There will be no individual responses sent &amp; phone inquiries will not be accepted.</b>

**\*All responses to this Request for Proposals must be received no later than 4:00 pm on September 12, 2025. No proposal will be accepted after this time.**

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## Section I: INTRODUCTION

The Eastern CT Workforce Investment Board (*EWIB*) is a private, not-for-profit corporation & is one of five (5) Workforce Investment Boards in CT. EWIB oversees three (3) American Job Center-East (*AJC*) Career Centers located in Danielson, Willimantic, and Montville. EWIB's mission is to coordinate a regional workforce development system that promotes economic vitality and equitable opportunity by preparing workers for in-demand, quality jobs on career pathways.

EWIB serves 41 towns in Eastern CT. All the services requested in this RFP are to be provided and bid on an Eastern region basis. EWIB is looking for a vendor to partner with others to provide a combination of services for the entire region as described below. The proposal should address how the proposer will deliver both in-person and remote training & services to maximize the quality, accessibility, and efficient delivery of services to residents across the region, including those in remote areas and with other barriers to access.

This is a Request for Proposals (*RFP*) for the delivery of the Workforce Innovation & Opportunity Act (*WIOA*) Title I Career Services for Adults, Dislocated Workers, & Youth in the American Job Centers (*AJC*) throughout the Eastern Region Workforce Development Area. The proposer selected will be responsible for: 1) the delivery of career services to the general population in concert with Connecticut Department of Labor (*CTDOL*) staff funded through the Wagner Peyser Act; 2) to WIOA-eligible Adults, Dislocated Workers, & Youth and 3) the case management of Jobs First Employment Services (*JFES*) welfare recipients required to meet work activity requirements under the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (*PRWOR*), which includes intensive employability-focused services and placement.

EWIB's core values are: 1) Partnership; 2) Innovation; 3) Accountability; 4) Efficiency; and 5) Continuous Improvement. EWIB seeks proposals in response to this RFP that demonstrate an embrace of these core values.

EWIB has released this RFP in an effort to solicit proposals for services that meet the attached RFP guidelines. Services requested are broken down into two (2) categories:

### **Category 1 - WIOA Adult, Dislocated Worker, & Youth Services**

- Career Services Support
- Human Services Integration Specialists
- WIOA Adult, Dislocated Worker & Youth Workforce Advisors

### **Category 2 - JFES Programs for TANF Recipients**

Instructions for submitting proposals are included in this RFP. Proposers must complete the proposal package, as instructed. **The deadline for receipt of proposals is 4:00 p.m. on September 12, 2025, without exception.**

**Send responses to:**

**EWIB**  
**108 New Park Avenue**  
**Franklin, CT 06254**  
**Attn: Carol LaBelle, Sr. Director of Programs & Special Projects**

Our purpose in presenting this request is to contract with well-qualified and experienced organizations that demonstrate the capacity to design and provide services for our WIOA Adult, Dislocated Worker, and Youth and JFES customers. EWIB intends to be as inclusive as possible in this solicitation. Funds may be added to the selected proposer's contract so that the selected proposer may provide employment services to individuals targeted by those grants.

**Bidder understands that they may be expected to take on additional, competitively acquired EWIB grant responsibilities during the contract period.** EWIB plans to fund proposals for activities and services with a one-year contract that may be extended for up to three (3) additional years based on performance, and subject to the availability of funds. **EWIB is encouraging collaborative submissions from partnering agencies capable of delivering services across the entire eastern region and willing to base the operations of the “lead” agency within the Montville AJC as it serves as the region’s comprehensive center.**

This request does not obligate EWIB to award a contract, or contracts, nor will EWIB pay any costs incurred in the preparation of proposals. EWIB reserves the right to accept or reject part or all of any or all proposals received.

#### **Type of Contract**

The contract will be cost reimbursement. The total contract amount will be reimbursed based on actual costs incurred according to approved budgets. Any awarded contract will conform to the terms required by the WIOA or JFES. Payment for services rendered will be made only when costs have been incurred, and documentation of all costs will be required. The term of the contract will be from **January 1, 2026 – June 30, 2026**. The contract may be renewed on a yearly basis for a period of up to three (3) additional years after the initial contract. Such renewals shall be contingent upon satisfactory performance evaluations by EWIB and subject to the availability of funds. This clause does not commit the agency to exercise the option to extend.

## **Section II: GENERAL CONDITIONS**

Proposals that do not follow the format, and do not include all the minimum requirements specified, including the required documentation and certifications in this RFP, and/or are not submitted by the due date and time will be considered non-responsive and will not be considered for funding and will be rejected.

### **A. Notification & Distribution**

The RFP is available by downloading the RFP from the EWIB website at: <https://www.ewib.org/about-ewib/rfp-rfq/> **Proposals must be received no later than 4:00 p.m. on September 12, 2025.**

### **B. Proposal Delivery & Specifications**

The format for proposals is provided in Solicitation Provisions: Section VII: Proposal Submission Instructions. Additional copies of pages may be made but must be kept in the proper numerical order. Proposers **may not** submit extraneous material such as brochures or newspaper articles.

Proposers are required to submit one (1) signed original unbound copy of the proposal, & **one** (1) electronic copy. Proposals submitted electronically without the requisite hard copy will be deemed non-responsive.

### **C. Non-Appropriation & Cancellation**

EWIB may cancel any resulting executed agreement upon 30 days written notice and any said agreement shall be subject to Federal and/or State funding availability.

### **D. Proposal Acceptance**

Any governmental or private organizations, whether for profit or non-profit, may apply. Proposers must be a legally recognized entity with appropriate licensing prior to the proposal being submitted.

No organization, nor its named partners or subcontractors, will be considered that:

- Have been debarred by an action of any government agency; or,

- Have a previous contract with any governmental entity in Connecticut terminated for cause; or,
- Have not complied with an official order of any agency of the State of Connecticut or the United States Department of Labor to repay disallowed costs incurred during their conduct of projects or services; or
- For any other good and just cause determined at the sole discretion of the EWIB.

These provisions include any related entities of the Proposer.

EWIB reserves the right to accept or reject any or all proposals received, or portions thereof. At the discretion of EWIB, all or part of this procurement may be declared failed, and all or portions of the RFP reissued.

#### **E. Review Process**

EWIB staff will review bids for compliance with RFP package and WIOA/JFES legislation/regulations. Bids that are not in compliance will be summarily dismissed and will not be reviewed by the EWIB Ad Hoc Procurement Committee.

##### **Staff will:**

- Open proposals at the close of the time for submission.
- Review for completeness and reject incomplete proposals.
- Review proposals for cost reasonableness.

EWIB reserves the right to short list the proposals received to the three (3) top-rated proposals following a staff review and to ask the top three rated proposers to provide a structured 10-minute presentation from the Proposer during a scheduled EWIB Ad Hoc Procurement Committee meeting.

**All final Committee recommendations will be forwarded to The EWIB Executive Committee and Board of Directors to be ratified at its next scheduled meeting.**

Proposals will only compete with other proposals from the same option category.

#### **F. Notification of Award**

The EWIB Board of Directors will make final funding decisions at a public meeting.

#### **G. Right to Protest**

Proposers may file a grievance related to the specifications within 72-hours of the publication of the RFP by stating in writing the legal basis for their grievance and submitting it to the attention of the EWIB President/CEO at the address listed herein.

Grievances related to failure to win the award must state the legal basis other than disagreement with a rater's score in writing and the grievance must be filed within 72-hours of the formal selection of the winning proposals by submitting it to the attention of the EWIB President/CEO at the address listed herein.

### **Section III: PERFORMANCE MEASURES**

Please note that all WIOA-funded & JFES-funded contractors are responsible for meeting measures as indicated by the program. All programs are required to be designed for maximum success in these measures.

### **Section IV: DESCRIPTION OF REQUESTED CAREER SERVICES**

WIOA requires that American Job Centers (AJC) be the front door for accessing career services under WIOA or from related federal and local workforce funding streams represented by other One-Stop partners co-located or in the region. Services are provided to job seekers needing

training and /or job placement as well as to employers looking for employees, employee training, information about workforce services and labor market information. There is one (1) full-service comprehensive AJC in Montville and two (2) affiliates in Danielson & Willimantic.

EWIB is interested in fostering an integrated approach to assisting individuals and employers while also avoiding duplication of services among the one stop legislative partners. This will result in better and more effective services for our clients and an expanded capacity within the community to increase the number of individuals being served.

The EWIB is looking for a vendor to partner with others to provide WIOA Title I Career Services in the full-service comprehensive AJC (Montville), and to staff and provide services or access to WIOA and One-Stop partner services in the Affiliate Centers as described in WIOA and the regulations promulgated there under.

Job seekers enter the AJC through the resource room. The selected proposer will be expected to coordinate with CTDOL to maintain and provide labor exchange services through the resource room, before being referred to an AJC partner or WIOA individualized services for those meeting WIOA eligibility requirements. The proposer's staff will be expected to assist with these functions and augment capacity already available at the AJC.

The proposer will be responsible for providing information in formats that are usable by and understandable to AJC customers.

Currently, WIOA & JFES staff and Wagner Peyser CTDOL staff are assigned to the comprehensive, full-service AJC in Montville; WIOA & JFES staff are also assigned to Willimantic & Danielson affiliates with limited CTDOL staff presence.

Individuals with one (1) or more of the WIOA barriers which interfere with their ability to be employed and self-sufficient or who are Dislocated Workers or are WIOA Adults receive individualized services and may already be utilizing a variety of social and human services in addition to those available through WIOA. Workforce Advisors (*Career Planners*) are responsible for coordinating the services needed with those already being delivered.

The proposer selected will be responsible for case management and counseling of participants during participation in WIOA and JFES-funded activities and through the 12-month follow-up/retention period in unsubsidized employment.

While there is no mandated order in the delivery of services, services available under WIOA Title I should be appropriate to meet the needs of the job seeker, including JFES recipients and employers.

### **Required Career Services**

Listed below are the career and business services EWIB requires to be delivered by the selected proposer through the AJC Comprehensive and Affiliate/Satellite Centers. Many of the services are informational or self-service or are available through technology.

- General information through orientations to services available through the AJC system for the general public.
- An orientation on the requirements for participation in WIOA Adult, Dislocated Worker, & Youth programs.
- A JFES orientation which provides information on requirements of the JFES program, incorporating the importance and benefit of gainful employment and explaining job search limitations and work activity requirements.



- General labor exchange services to the universal population and employers in coordination with the CT Department of Labor (CTDOL).
- The provision of local, regional, & national labor market information to job seekers & employers, including job vacancy listings.
- The provision of employment statistics for the EWIB Labor Market.
- The provision of the occupations in-demand lists to job seekers.
- Information relating to local occupations in-demand & the earnings, skill requirements and opportunities for advancement for such occupations.
- Information on filing unemployment compensation claims.
- Outreach, intake, certification review and approval, and the coordination of outreach with the AJC partners, recruitment, and determination of WIOA eligibility of Adults, Dislocated Workers, and Youth.
- Referral of individuals to other AJC partners, as appropriate.
- Referral to English language acquisition & integrated education & training programs.
- The referral of WIOA-eligible *“Out-of-School Youth”* and *“In-School Youth”* to training, placement, or other EWIB Youth providers.
- Referral of individuals for information regarding the availability of financial aid for education not provided by WIOA.
- *“Work First”* services to JFES clients, including, but not limited to work registration, career counseling, job search, assessment, screening, placement into a work activity, job development, referral to educational activities, job placement.
- Job Development and placement into unsubsidized employment in coordination with CT DOL for the universal population, WIOA and JFES participants.
- Access to and the provision of computer-based technologies related to workforce activities such as financial literacy, digital literacy, and basic skills remediation.
- Coordination and referral to short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct, to prepare individuals for unsubsidized employment or training.
- Services to assist WIOA Adults, Dislocated Workers, and Youth to obtain or retain employment, that may include as appropriate, assessments of individual skill levels and support service needs, interviews and evaluations to identify employment barriers and employment goals, development of an individual employment plan, identifying appropriate employment goals, and the services needed to achieve the employment goals, providing information on eligible training providers, and career pathways to attain career objectives.
- A labor market analysis to develop an employment goal targeted toward attainment of self-sufficiency or a livable wage.
- Development of JFES & WIOA client individual service strategies.
- Individualized counseling, which includes elements of employability life skills, job, and career counseling as appropriate to the client.
- Case Management during program participation, which includes flexible work hours for counselors to suit a working clientele & allow for evening & possibly weekend accessibility between the client & their case manager.
- Referral of clients needing assistance beyond the case manager’s expertise to other AJC partners & agencies providing assistance such as, but not limited to, mental health, substance abuse, or domestic violence.
- Referrals of eligible and enrolled WIOA participants to occupational skills training and award of an Individual Training Account voucher for training with an eligible training provider.
- Development of internships & work experiences that are linked to careers for Adults, Dislocated Workers, and Youth.
- Referrals of WIOA participants to work-based training options such as: On-the-Job Training, Manufacturing Pipeline Program, Healthcare Pipeline Program & others.
- Use of the State’s management information system (MIS) called CTHires for WIOA and JFES participants to record all services provided.



- Post-services employment follow-up case management, counseling, advocacy, and replacement into unsubsidized employment for WIOA and JFES participants throughout the 12-month retention period.

### **Category 1: WIOA Adult, Dislocated Worker, & Youth Services**

All services and activities proposed must meet the specifications contained in this section of the RFP. **EWIB is encouraging collaborative submissions from partnering agencies capable of delivering services across the entire eastern region and willing to base the operations of the “lead” agency within the Montville AJC as it serves as the region’s comprehensive center. In this regard, creative partnerships and teaming arrangements are strongly encouraged.**

EWIB is seeking a WIOA Adult, Dislocated Worker, & Youth Workforce Development & Placement Unit which will include Career Services Support, Human Services Integration Specialists, and Workforce Advisors. Workforce Advisors will provide employment assistance for low-income adults & laid-off workers. This includes outreach, recruitment, intake, and eligibility determination, case management, job search assistance and follow-up, and retention services. Staff (with the assistance of technology, as needed) must be capable of assisting language-challenged adults. Additionally, AJC staff must interface with the Business Services Team members who perform outreach to local employers and relay employer needs to EWIB partners. All services and activities proposed must meet the WIOA guidelines and EWIB’s goals and objectives. **The proposal must describe how the Proposer will deliver both in-person and remote training & services to maximize the quality, accessibility, and efficient delivery of services to residents across the region, including those in remote areas and with other barriers to access.**

- **Career Services Support:**

The Proposer must describe how they will provide staff support (*bilingual in Willimantic & Montville AJCs*) to assist customers at the Information Desk, in the Resource area, as well as provide support for counseling staff and other services, as determined. EWIB anticipates the need for a minimum of one (1) full-time person to staff each of the three (3) AJCs. Career Services workers are required to provide referrals and other services as needed. This Customer Services Specialist function is the primary capacity sought under this category.

- **Human Services Integration Specialist:**

EWIB anticipates the need for two (2) professional staff to serve vulnerable AJC customers. The Proposer must describe how they will provide a holistic approach that addresses not only customers’ employment and educational needs, but their basic needs as well. The services must be delivered at all three (3) AJCs. The staff will be required to conduct an in-depth interview, identify appropriate linkages to programs and services that customers may be eligible for (*e.g., SSI disability, subsidized housing, community-based services including child-care and transportation*). This includes assisting customers to apply for these services, follow-up to ensure that customers are receiving the needed services, and active support for each customer as they pursue their goals ~ with a focus on the development of the skills and habits needed for long-term self-sufficiency. Staff facilitate the development of a plan that enables access to a broad array of services and focuses on the achievement of specific, attainable customer-defined goals and outcomes. Staff must incorporate services for customers with disabilities and will be required to maintain EWIB’s Employment Network, as defined by Social Security’s Ticket-to-Work Program. Proposers should describe plans to maximize awareness of, and accessibility to, AJC-East services throughout the 41-town service area via strategies to deploy Human

Services Integration Specialists at community access points (e.g., public libraries, community centers) and AJC partner organizations that serve populations likely to benefit from AJC services.

- **WIOA Adult, Dislocated Worker, & Youth Workforce Advisors:**

Proposals solicited to provide employment assistance for low-income Adults, Dislocated Workers & Youth. This includes outreach, recruitment, certification, assessment, case management, employment plan development, job search assistance, referral to services identified in the employment plan, as well as client tracking to show implementation of the plan. Also responsible for assisting clients with the provision of training services through the Individual Training Accounts (ITA) vouchers, support service coordination, employment plan update, including job search assistance, and post-program follow-up. The WIOA Adult, Dislocated Worker, & Youth Workforce Advisors will be required to provide case management services and a minimum of 12-months of follow-up for all registered WIOA Career, Intensive, and Training clients. Additional activities may be required, such as enrolling clients in OJT (*On-the-Job Training*) programs, facilitating AJC workshops, providing extensive outreach and recruitment, and providing partner services to unregistered core clients, including referrals, transportation certification, and enrollment. Workforce Advisors will need to focus on assisting customers with job search support and placement activities and work closely with the Business Services Team, as well as Technology provider to ramp-up placement activity. Workforce Advisor will need to begin to specialize in targeted industry clusters.

Based on staffing and population needs, or EWIB directive, staff may be required to travel between AJC locations, or to employer worksites in the EWIB area. The proposal must indicate their ability and capacity to “*staff-up*” for this challenge, if, and when, additional funding becomes available. The proposal should also include anticipated requests for clerical assistance essential to the ability to perform this service. It is estimated that three or four (3 or 4) Workforce Advisors are needed, *one to one and a half (1 – 1.5) between both Affiliate Centers & two to two and a half (2 – 2.5)* in the Montville AJC for WIOA Adult, Dislocated Worker, & Youth services.

Workforce Advisors are responsible for maintaining the following information and documentation in the participant’s CTHires file:

- Participant application & supporting documentation.
- Copies of all WIOA forms
- Assessment (OAS) and Employment Plan
- Test results
- Period of participation
- Attendance records
- Proof of credential attainment
- Proof of Measurable Skills Gain
- Contacts & communication with participants in the form of monthly case note entries.
- Progress in completing training.
- Performance evaluation form
- Follow-up and retention information & documentation
- Other appropriate documentation.

## 1. **WIOA Program General Information**

- **Performance Measures & Enrollment Schedule**

WIOA performance measures are negotiated by EWIB and the CT Department of Labor and must be met. The performance measures are clearly outlined below. Providers who do not substantially meet the USDOL performance standards applicable to the various funding streams as described in the contract document will not be renewed.

### **The Adult/Dislocated Worker Performance Measures:**

- The % of participants who are in unsubsidized employment during the second quarter after exit from the program.
  - The % of participants who are in unsubsidized employment during the fourth quarter after exit from the program.
  - Median earnings of participants in unsubsidized employment during the second quarter after exit from the program
  - The % of those participants enrolled in an education or training program (*excluding OJT and customized training*) who attained a recognized postsecondary credential or a secondary school diploma, or its recognized equivalent, during participation in or within 1-year after exit from the program.
  - The % of participants who, during a program year, are in an education or training program leading to a postsecondary credential or employment and are achieving documented measurable skill gains.
- **Enrollment Schedule**  
EWIB expects full program enrollment by the end of the 3<sup>rd</sup> quarter in the Program Year. Proposers should plan outreach and enrollment activities accordingly. All WIOA contractors should maintain the following enrollment schedule as a guide:
    - 25% Enrollment by the close of the 1<sup>st</sup> quarter in the program year (9/30)
    - 50% Enrollment by the close of the 2<sup>nd</sup> quarter in the program year (12/31)
    - 100% Enrollment by the close of the 3<sup>rd</sup> quarter in the program year (3/31)
  - **Outreach, Recruitment, Certification & Follow-up Requirements**
    - A. Recruitment  
The proposer should plan to focus a portion of the Workforce Advisor's time on recruiting and attracting new non-TANF participants. Contractors will have the requirement for conducting Rapid Response and/or Early Intervention activities during company lay-offs or shut-downs in coordination with the CT Department of Labor.
    - B. Certification  
The Contractor will provide an overview of the services, benefits, and opportunities available by participating in EWIB's WIOA funded and non-WIOA funded (*collaborative partnership*) programs to prospective clients, and other interested parties. The Contractor will screen clients for WIOA eligibility, collect the appropriate WIOA documentation, and submit it to EWIB, or its designee, for approval. In addition, the proposal for WIOA Adult & Dislocated Worker services should include contract certification review and approval. Copies of all documentation and registration information must be maintained in each contractor's client file. General eligibility requirements include Social Security, Citizenship, Selective Service, & Age. Specific WIOA eligibility requirements include low-income (*WIOA Dislocated Workers are not subject to low-income requirements*), family size/individual status, & barriers.  
  
Clients that are certified eligible for WIOA services, but do not meet the enrollment requirements, or cannot be served will be provided further assessment, as necessary and be referred to appropriate programs that may or may not be WIOA-funded to meet his/her basic skills and training needs. The Contractor makes these referrals.
    - C. Follow-up Services  
Participants exit when no further active services from a WIOA-funded or non-WIOA funded partner are planned (*called a "soft exit"*); and there has been a gap in

services for more than 90-days. The tracking system automatically exits a participant when such a gap has occurred (a “soft exit”). Alternately, an immediate “hard exit” is entered *for those unemployable due to health/medical reasons, incarceration, institutionalization, those called to active military duty, or death*. In either case, the outcome period begins at exit, so it is imperative that follow-up services begin shortly after exit in order to maintain contact with participants.

Exit does not mean the end of services; it should be considered a change in status. The follow-up period can be used to ensure stable & positive transition periods. The intensity of follow-up can be proportionate to the intensity & duration of active service. WIOA need not fund follow-up, & bidders are encouraged to be creative in developing means to provide this required service. The provider is, however, responsible for coordinating follow-up, gauging its effectiveness and appropriateness, maintaining appropriate periodic contact with the participant & documenting all activities.

## Category 2: JFES Programs for TANF Recipients

All services and activities proposed must meet the specifications contained in this section of the RFP. The Proposers will strive to reach full enrollment in all program activities to ensure the best utilization of all available resources. **EWIB is seeking proposals to serve the entire Eastern region in a collaborative approach. In this regard, creative partnerships and teaming arrangements are strongly encouraged.**

### 1. JFES Performance Measures & Enrollment Schedule

- Performance Measures

JFES performance measures are negotiated by EWIB and the CT Department of Labor and must be met. The performance measures are clearly outlined in this proposal under the Definitions section.

- Enrollment Schedule

TANF clients are enrolled year-round through the last day of the contract year. Enrollments are made on a rolling basis according to client and CT Department of Social Services (DSS) need. Clients enrolled in the previous program year who have not exited will automatically roll over into services for the next program year.

### 2. JFES Case Management

The Case Management of TANF clients shall follow a Family Centered Coaching (FCC) approach, using all FCC tools (Who is My Family, My Hopes and Dreams, Wheel of Life and Plan, Do Review), with every JFES participant. Family Centered services should and consist of the following core functions: providing intake/orientation & assessment services including the “Do What You Are Assessment” – identifying and helping the customer resolve barriers to employment, developing and maintaining a resume and current Employment Plan; arranging services; establishing community service & supported work experience opportunities in partnership with job developers; data management, tracking, & monitoring, and ensuring that client meets participation rate requirements. Attendance documentation must be collected regularly and documented in CTHires. Staff are required to meet with customers in person monthly, in addition to weekly check-ins by phone, email or text.

The current regional caseload is ~300, & with an average caseload of 65-80 it is anticipated that approximately 4 case managers would be needed. Since the region’s Northern case load is less than Southern region, approximately one (1) to two (2) Case Managers are needed (*if three are planned one should be available to split time between two offices*); and with the Southern case load, approximately two (2) to three (3) Case Managers are needed.

Additionally, in order to meet the needs of the JFES population, EWIB will require that JFES Case Managers perform the WIOA functions when appropriate for their JFES clients (*i.e., certification to access training*). The need for an additional working supervisor to assist with JFES functions could be considered. Additionally, bids should contain support staff necessary to manage TANF client orientations, required JFES workshops, and clerical support. EWIB encourages the deployment of artificial intelligence and/or other technologies to increase service delivery efficiency and cost effectiveness, improve customer experience, and enable staff to devote more time to meaningful interactions with customers. JFES Case Managers will be required to have flexible scheduling ability in order to meet the needs of clients who are working during traditional hours. JFES contractors must provide monthly performance and caseload reports to EWIB.

All JFES Case Managers must be flexible enough to meet the Case Management needs of the changing JFES client loads in each area. There is also a need for continuous training and attendance at various local and CT DOL, DSS, and Board organized meetings. All JFES staff will be contractually obligated to attend these meetings and trainings unless waived by EWIB. The vendor must comply with any changes put forth by the State or EWIB to accommodate this re-authorization. **The proposal must address how they will deliver both in-person and remote training & services to maximize the quality, accessibility, and efficient delivery of services to residents across the region, including those in remote areas and with other barriers to access. JFES, however, is primarily required to be in person with virtual orientations.**

### 3. JFES Placement Unit

Job Search and Job Readiness Assistance is another required service that must be provided. The proposal must identify the level and intensity of job search and job readiness assistance to be provided to JFES customers such that the goals of the program are met. Job search and job readiness assistance includes, but is not limited to job search skills training, individual structured job search, job development and placement, supervised job search support group, and job-readiness workshops.

The JFES Placement Unit will provide the required JFES Interview to “Get the Job You Want” workshops and assist case managers as needed with the “Do What You Are” assessment, resume development and placing customers into community service, subsidized employment, and un-subsidized employment or training, as appropriate. It is estimated that 1 staff person is needed for this position. The number of subsidized employment slots will be identified by EWIB. Subsidized Employment is another opportunity that should be included in this proposal. This opportunity is for those TANF participants who have a poor work history. Subsidized employment work sites will be set up in both the public and private sector for between 20 & 30 hours per week in conjunction with other allowable activities for a maximum of 9-months. Staff will be required to add all subsidized employment worksite agreements, timesheets, case notes and related documents. The participant will receive at least the minimum wage. Sites are developed individually to meet the needs of the participant. The goal of this service is an unsubsidized placement at the participant’s worksite. Another employment option that should be included is community service. Community service opportunities are structured programs in which TANF recipients perform work for the direct benefit of the community under the auspices of public or non-profit organizations. Community service programs must be limited to projects that serve a useful community purpose in fields such as health, social services, environmental protection, education, urban and rural redevelopment, welfare, recreation, public facilities, public safety, and childcare. Community service is designed to improve the employability of participants who are otherwise unable to obtain employment.

It is imperative that the job developer works closely with the Business Services Team as they outreach to area businesses to coordinate efforts.

The Proposer can merge the function of case management & job development. This would reduce the per-staff-member caseload. Staff would be responsible for both case management services & job development to better serve the JFES customer.

## Section V: SUPPORT SERVICES

Support services may be made available to eligible WIOA & JFES individuals who have been enrolled in a WIOA or JFES-funded activity to the extent they are not available from other sources within the community. It is anticipated that economically disadvantaged individuals and/or Dislocated Workers, Youth, or JFES participants may need transportation services and childcare while in job-search or when participating in other WIOA or JFES-funded activities. The proposer will be responsible for providing access to support services in accordance with the EWIB support service policies and will be assigned a budget amount for the provision of support services. Individuals needing additional services or services not offered by EWIB must be referred to other agencies in the community offering needed support services.

## Section VI: GENERAL REQUIREMENTS FOR ADMINISTRATION OF THE PROGRAMS

### **Reporting:**

A WIOA Activity form must be completed by the Service Provider within one (1) working day into the CTHIRES system of an activity start, completion, or incompleteness. The purpose is to report client enrollments, exits, placements, credential attainments, and other required information in the CTHIRES. Service Providers must respond to monthly performance summary reports as requested by EWIB. **For TANF clients, all information will be entered directly into the same state CTHIRES database (or other CT designated system) within one (1) business day by the Case Management contractor.**

### **Monitoring:**

All contractors will be monitored on at least a yearly basis, per WIOA & JFES regulations. This will consist of separate programmatic and fiscal monitoring for each contractor. Contractors will be required to make staff available within a 2-week timeframe for any State, Federal, or Board audits.

### **Record Keeping:**

During the outreach and recruitment phase, and upon the participant's exit from the employment and training program, the service provider will be the primary record keeper, maintaining records on each participant and making these records available to EWIB, state, and federal officials, and auditors. Records will include a copy of the participants' application, assessment, employment plan, referrals, status changes, terminations, goals, weekly performance and attendance reports, disciplinary reports, evaluations, payroll documentation, case notes, and any other pertinent records. All records for the program must be retained for a period of three (3) years following the end of the year the client is exited from services. Records are public and must be made available upon written request. In addition, the service provider will be required to maintain records as appropriate, particularly in terms of attendance and program performance, release of information, and grievance procedures. Any criteria for participant termination must be maintained as well.

### **Staffing:**

EWIB is seeking a provider with staff who are experienced in working with the populations specified in this RFP. A description of staffing positions should be included in the proposal. Where applicable, all staff should possess the appropriate and necessary credentials and certifications required for conducting services and/or training in the State of CT. **There are currently direct services staff providing the services requested under this RFP. The selected proposer will be required to interview & consider all existing staff before conducting general outreach to fill positions.**

**Facilities:**

All bidders will conduct participant services primarily at the local *AJC-East* facilities based on space availability. Proposers should also describe their capacity to deliver services at community access points (e.g., libraries, community centers) and/or at organizations that serve members of the program target population, to increase potential customers' awareness of and access to services.

**Insurance:**

The service provider who is awarded funds for service delivery is required to provide the following insurance coverage by contract execution:

- Commercial General Liability to include a Broad Form Property Damage Endorsement & Contractual Liability. Minimum limit of \$1,000,000 combined single limit per occurrence \$2,000,000 Aggregate
- Automobile Liability including all owned and non-owned and hired vehicle - minimum limit of \$1,000,000 combines single limit per occurrence
- Workman's Compensation – Statutory
- Employer's Practices Liability – \$1,000,000 per occurrence
- Professional Liability – Minimum limit \$1,000,000
- Intellectual Property – To cover any patent, copyright or trademark infringement claims including the cost of the defense of any action brought against EWIB, its governing Boards & Contractors
- Fidelity/Crime/Honesty Bond – In the amount of funds awarded to proposer(s).

Each insurance policy required by this Agreement shall be endorsed to contain the following provisions:

- I. This insurance shall not be changed, canceled, limited in scope of coverage or non-renewed until after thirty (30) days written notice has been given to EWIB.
- II. If a thirty (30) day notice of cancellation endorsement is not received, the cancellation clause must include language as follows, which edits the pre-printed Accord certificate:

Should any of the ABOVE-DESCRIBED Policies be Cancelled Before the Expiration Date Thereof, the Issuing Company Will Mail Thirty (30) Days Written Notice to the Certificate Holder Name to the Left.

- III. All rights of subrogation are hereby waived against the State of Connecticut, its appointed officials, officers, and employees, EWIB, its elective and appointed officials, officers, and employees, when acting within the scope of their employment or appointment. *(Endorsement must be attached to the Certificate of Insurance.)*

With respect to operations of the named insured performed on behalf of EWIB, are added as additional insureds except for Workers' Compensation/ Employers' Liability and Professional Liability. *(Endorsement must be attached to the Certificate of Insurance.)*

It is agreed that any insurance maintained by EWIB will apply in excess of, and not contribute with, insurance provided by this policy. *(Endorsement must be attached to the Certificate of Insurance for the General Liability policy.)*

Any losses shall be payable notwithstanding any act or failure or negligence of EWIB, or any other person.

Commercial General Liability policy shall contain a severability of interest's clause.



Contractor agrees to maintain Professional Liability Insurance, as appropriate, for a period of two (2) years following completion of this Agreement.

EWIB shall retain the right at any time to review the coverage, form and amount of the insurance required hereby. If, in the opinion of EWIB, the insurance provisions in this section do not provide adequate protection for EWIB, EWIB may require Proposer to obtain insurance sufficient in coverage, form, and amount to provide adequate protection. EWIB requirements shall be reasonable and shall be designed to assure protection from and against the kind and extent of risks which exist at the time a change in insurance is required.

The procuring of such required policy or policies of insurance shall not be construed to limit Proposer's liability hereunder or to fulfill the Indemnification provisions and requirements of the agreement to be entered into as a result of this proposal.

The proposer(s) must agree to cooperate with and provide such information as may be requested by EWIB for the purpose of filing reports with the State and the EWIB Board of Directors.

In the event of a conflict or ambiguity between the rules, terms, and conditions set forth in the RFP and the statutes, laws, State policies and regulations, the statutes, laws, State policies and regulations shall prevail. EWIB shall be responsible for making all determinations in this regard.

### **The Agreement Type & Budget:**

All contracts negotiated as a result of this RFP will be cost reimbursement. This is a contract format wherein all allowable costs detailed in the budget attached to the executed contract are reimbursed upon submission of documentation, which substantiates the expenditures. Allowable means allowable under both the grant funding stream supporting the contract expenditures and the executed contract.

Initial contracts will be written for a six-month term beginning January 1, 2026, and subsequent renewals may be written for three (3), one (1) year periods beginning July 1<sup>st</sup> following the first year, based upon performance. Renewal will be the option of the EWIB Board of Directors. Contracts will contain additional clauses related to termination for convenience with the proper notice to provide for contractors not wishing to continue services beyond any one-year period. Performance will be measured each year.

The proposers must complete the budget section of the proposal using the forms provided in this package. RFP responses, which do not include the budget forms, or which include non-conforming budget worksheets, will be deemed non-responsive. The Budget is part of the RFP response and can be downloaded from the EWIB website at <https://www.ewib.org/about-ewib/rfp-rfq/> as **Attachment C**. Paper copies will not be available.

All costs, including profit (*if applicable*), salaries and merit increases, are subject to negotiation as a part of the contracting process. EWIB will compare salaries and other costs proposed with costs and salaries for similar positions and responsibilities in its Workforce Development Area in arriving at reasonable negotiated costs. Salaries reimbursed, or partially reimbursed, under contracts funded as a result of this RFP may not exceed the federal salary cap.

Travel outside of the EWIB Workforce Development Area must be described and justified in the proposal and included in the budget along with details regarding the need for travel, the number of people who will be traveling, and the length of the stay. EWIB shall determine the reasonableness of the travel during negotiations. All in and out of Workforce Development Area travel will be subject to EWIB mileage rates, travel rules, and procedures unless the proposer's policies and procedures have been reviewed and approved by EWIB.

No equipment purchases are allowed. Leasing arrangements for property or staff must be competitively procured and approved during negotiation of the contract.

Lease agreements may not be from the proposer or proposer's organization, or from a subsidiary, or related company, or corporation unless they are leased to the general public at the same price as offered under this RFP.

The Office of Management and Budget **Uniform** Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards ("**Uniform Guidance**") December 2014 2 CFR 200 is applicable to all sub-grant expenditures to be funded by contracts entered into as a result of this RFP.

Any and all work performed, or expenses involved, in the preparation and submission of proposals shall be borne by the applicant(s). No payment will be made for any efforts or expenses prior to commencement of work as defined by a fully executed contract.

Programs must describe their capacity to supervise proposed staff. The supervisor will be the point of contact for EWIB staff.

Identify other funds and/or in-kind resources that will be provided to offset costs being requested. Upon award, the contractor will be expected to provide financial accounting of any in-kind resources.

**Equipment:**

The Contractor is responsible for providing their staff with the necessary technological equipment to perform the task at hand. The Contractor must ensure the staff has the technical support to maintain such a function. The computer(s) must have the capability of gaining access to CTHIRES, via Microsoft Internet Explorer Version 6.0 or greater. Connection to the Internet may be provided by the CT Department of Labor's wide area network. Software, including virus protection/internet security along with printing peripherals is required.

**Publicity:**

The decision to approve, and therefore, subsequently implement any and all requests for proposals by this Administration will carry with it the requirement that sub-grantees must name EWIB as the source of funding in any and all publicity denoting program operation. Copies of all publicity will be required to be provided to EWIB **prior to reproduction**.

**Grievance & Procedures:**

In the event a Proposer(s) wishes to file a grievance in connection with the process, a grievance procedure is available *and may* be obtained from EWIB's Administrative Offices. Grievances related to this proposal must be filed in writing within the timeframes stated in the EWIB grievance policy.

**Conflict of Interest:**

All applicants must disclose the name of any officer, director, or employee who is a member of the EWIB governing boards or an employee of EWIB. All applicants must disclose the name of any EWIB employee who owns, directly or indirectly, any interest in the applicants' business or any of its branches. Such disclosure must be submitted in a separate letter included with the Application for WIOA Title I Career Service Funds, no later than the proposal deadline.

**Interference with the Procurement Process:**

Applicants are hereby advised that EWIB will not award funding to an organization, person, or entity which has hired a person, whether directly or indirectly, or consented to or acquiesced in the employment of a person, whose principal responsibility is to lobby a member of the EWIB, Inc. or EWIB Elected Officials on behalf of the organization, person, or entity which seeks funding from EWIB.

Any applicant or lobbyist for an applicant, paid or unpaid, is prohibited from having any private communication concerning any procurement process or any response to a procurement process

with any EWIB staff or rating committee members after the issuance of a funding opportunity and until completion of a contract award. A proposal from any organization will be disqualified if the applicant or a lobbyist for the applicant, paid or unpaid, violates this condition of the procurement process.

**Compliance:**

The proposer(s) will fully comply with the applicable requirements of the Acts through which funds are received. It will comply with applicable directives issued by the Connecticut Department of Labor, the Connecticut Department of Social Services as it applies to JFES funds, or other appropriate State department(s). The proposer assures that it will comply with other federal statutes applicable to this agreement.

**EWIB Right to Reject or Accept:**

EWIB retains the right to accept, modify, reject entirely, or partially reject any and all proposals if, in its judgment, the work proposed will not accomplish the objectives of this project or does not meet all of the requirements of this Request for Proposal.

**Statement of Work**

The Statement of Work is the body of the proposal and should give reviewers a clear picture of the design and cost of the project, activity or service, the anticipated outcomes, and the proposer's capacity to deliver the program services being proposed. *This information must be presented in the following sequence:*

**A. Design, Program Service, Performance Outcomes (30 points)**

**Category 1: WIOA Adult/Dislocated Worker/Youth Services: Workforce Development & Placement Unit**

Core, Human Services Integration Specialist & Workforce Advisors. *(Must bid on entire Eastern Region)*

- **Goals & Objectives:** Clearly list your proposed goals and objectives for the contract period. These must be specific, measurable, attainable, and aligned with the goals and performance standards outlined in this RFP. Include any additional project-specific goals and specify the target performance level (% completion) for each. Note that EWIB will provide standardized reporting formats during contract negotiations.
- **Outreach & Rapid Response:** Describe your outreach strategy for engaging non-TANF WIOA participants. How will you respond to large-scale layoffs or dislocations? Do you have the capacity to deploy staff to employer sites for Rapid Response as needed?
- **Eligibility & Assessment:** Outline your staff's experience with WIOA eligibility determination and customer assessment processes.
- **CASAS Testing:** Do you currently have CASAS-certified staff? If not, are you willing to train staff for CASAS (CCS) testing?
- **Case Management & Job Search:** Describe your agency's and staff's experience in case management and job search assistance techniques. Provide examples, if applicable.
- **Interagency Collaboration:** Explain how your staff will collaborate with partner organizations and service providers within the local workforce ecosystem.
- **Workshops & Group Facilitation:** Are staff experienced in facilitating group workshops? If yes, describe the types of workshops provided and relevant expertise.
- **Knowledge of Local Services:** Describe how well staff understand and utilize local community resources and support services to assist customers.
- **Bilingual Support & Technology Use:** Will you provide bilingual staff in Montville and/or Willimantic? How will you leverage technology to ensure quality service for non-English speakers, especially when served by monolingual staff? Are staff trained in customer service, phone and email etiquette, and basic office systems?

- **Employer Engagement:** Describe your team's experience in working with employers, including strategies for job development, referrals, or partnership building.
- **Technology & Innovation:** Explain how you will incorporate artificial intelligence or other emerging technologies to enhance service delivery, reduce costs, improve efficiency, and allow staff to focus on high-value customer interactions.
- **Technology Proficiency:** Are staff proficient in data entry, word processing, and reporting? Describe their ability to effectively use CTHires, the state's workforce management system.
- **Performance Monitoring:** How will you ensure consistent monitoring and achievement of performance outcomes?
- **Availability & Flexibility:** Will staff be available for required state and local meetings, off-site travel, and flexible enough to rotate among AJC sites or manage caseloads across all three (3) locations as needed?
- **Follow-Up Methodology:** Describe your strategies to ensure timely and complete after-exit follow-up to meet WIOA requirements.
- **Customer & Employer Satisfaction:** How will you ensure high levels of customer and employer satisfaction? Will staff actively contribute to the statewide employer satisfaction survey (e.g., by submitting employer contacts)?

**Category 2: JFES Programs for TANF Recipients** *(Case Management & JFES Placement Unit) (Must bid on entire Eastern Region)*

- **Goals & Objectives:** Outline your proposed goals and objectives for JFES services during the contract period. Goals must be specific, measurable, and attainable, and reflect the standards outlined in this RFP. Indicate your target performance level (% achievement) for each goal, including any project-specific objectives. EWIB will provide a standardized format for reports and evaluations.
- **Experience with High-Need Populations:** Describe your staff's experience serving hard-to-employ, low-income individuals who face multiple barriers to employment. Include specific populations served and strategies used to support client success.
- **Eligibility & Assessment:** Detail your team's experience with WIOA eligibility determination and assessment for training, especially for clients dually enrolled in WIOA and JFES programs.
- **Experience with JFES Program & Integration:** Describe your agency's and staff's experience providing JFES services. Are staff knowledgeable about current JFES policies, state database systems, and WIOA performance standards? How will you ensure smooth integration of JFES and WIOA services for dually eligible participants?
- **Bilingual Service Delivery:** Do you currently have Spanish-speaking staff available for Case Management in Montville and/or Willimantic? If not, how will you meet this need? Explain how you will leverage technology to support high-quality service for non-English speakers, particularly when served by monolingual staff.
- **Use of Technology & Innovation:** How will your organization utilize artificial intelligence or other technologies to enhance service delivery, improve efficiency, increase customer satisfaction, and free staff to focus on personalized interactions?
- **Data Entry & Workflow Management:** Describe your plan to ensure all data is entered into CTHires within one (1) business day, and that Case Managers receive updated information in the same timeframe. What tools or systems will you use to meet these requirements?
- **Performance Monitoring:** Explain how your agency will track and ensure compliance with JFES performance measures throughout the contract period.
- **Staff Participation & Training:** Confirm that all JFES staff will be available for required state and local meetings and training sessions. Describe your commitment to continuous staff development and responsiveness to Board expectations.
- **CASAS Testing Capability:** Do you currently have CASAS-certified staff available for CCS testing? If not, are you willing to ensure staff are trained and certified as needed?

- **Family-Centered Case Management:** Describe your agency's and staff's experience using family-centered case management models to holistically support JFES participants.
- **Job Search & Job Development:** Outline your team's experience in providing job search support and job development services. Include strategies for employer engagement and placing clients in meaningful employment.
- **Timely Intake & Orientation:** How will you ensure that all clients receive group or individual Intake and Orientation within 10 calendar days of DSS referral? Describe your flexibility in offering non-traditional appointment times to accommodate working clients.
- **Local Resource Knowledge:** Are your staff familiar with the local service landscape (e.g., housing, transportation, training, childcare)? Describe how this knowledge is used to support client success.
- **Caseload Management:** The standard JFES caseload is 65–80 clients per Case Manager. Describe your staff's ability to manage this volume while maintaining service quality and performance standards.
- **Flexibility Across AJC Sites:** Will your case management and JFES staff be available to travel between AJC locations as caseload demands fluctuate? Can you designate at least one Case Manager to manage a caseload across all three AJC offices?
- **Supported Work Experience:** Describe your agency's ability to establish supported work experience sites, including your understanding of the local labor market and your capacity to serve as the employer of record for clients receiving paychecks through these placements.

**B. Leverage of Resources & Community Support (10 Points)**  
**COLLABORATION & COMMUNITY PARTNERSHIPS**

- **Describe the partnerships your organization has established with other public or private entities that will directly support the delivery of proposed program services.**
  - Which organizations are involved, and what roles do they play?
  - How will these partnerships enhance outreach, access, or service quality for target populations?
  - What specific contributions—such as referrals, service coordination, facilities, or program supports—will each partner provide?
  - Include any formal agreements or MOUs that demonstrate the strength of these collaborations.

**IN-KIND SUPPORT & RESOURCE LEVERAGING**

- **Detail any in-kind resources or external funding that your organization or partners will contribute to support this program.**
  - Quantify contributions wherever possible (e.g., staff time, equipment, space, services, funding).
  - Explain how these leveraged resources will strengthen program implementation, sustainability, or impact.
  - Indicate whether resources are confirmed or anticipated and describe how they align with the goals of the proposed services.

**C. Organizational /Administrative Capacity (10 Points)**  
**STAFFING STRUCTURE & CAPACITY**

- **Describe the staff who will support this project.**
  - Provide job descriptions for each position to be funded, including required qualifications and relevant experience.
  - Explain how staff will be recruited, selected, and onboarded. Include typical hiring timelines and your ability to “staff-up” as needed.
  - Describe existing and planned training initiatives, particularly related to the use of artificial intelligence and technology to enhance service delivery.
  - Attach résumés of current staff and/or job descriptions for positions to be filled.

## **MANAGEMENT PLAN & OVERSIGHT**

- **Outline your proposed management structure for the program.**
  - Include a clear narrative and organizational chart showing lines of authority, including both program and administrative staff, supervisors, and leadership.
  - Describe the systems and procedures in place to ensure program objectives are met, contractual obligations are fulfilled, and services are delivered with consistency and quality.

## **PROGRAM MONITORING & PERFORMANCE TRACKING**

- **Describe your internal monitoring systems and performance management approach.**
  - How will staff track client services, time and attendance, case progress, and program outcomes?
  - Explain your procedures for quality assurance, corrective action, and follow-up.
  - Describe how customer satisfaction and progress will be assessed, and how findings will inform program improvements.
  - Outline your reporting systems and how program data will be used for continuous improvement and compliance.

## **FISCAL CONTROLS & FINANCIAL MANAGEMENT**

- **Explain your organization's capacity to manage public funds responsibly and report financial activities accurately.**
  - Describe your internal controls, including how funds will be safeguarded and expenditures tracked by cost category (WIOA vs. JFES; admin vs. program).
  - Outline your payroll, cash management, and accrual reporting systems.
  - Describe your organization's bonding coverage for staff handling funds, including type, agent, coverage level, and roles covered.
  - Demonstrate your ability to maintain timely, accurate, and auditable records in accordance with federal and state guidelines.

### **D. Performance History (20 Points)**

#### **ADMINISTRATIVE EXPERIENCE & RECORD KEEPING**

- **Describe your organization's previous experience delivering services similar to those proposed.**
  - What is your current administrative capacity to support program operations and compliance?
  - Describe your recordkeeping systems and procedures, including the types of records maintained, how they are organized, and where they are stored.
  - Confirm your organization's willingness to provide access to program and financial records for monitoring and audit purposes.

#### **PERFORMANCE HISTORY & ORGANIZATIONAL QUALIFICATIONS**

- **Provide a summary of your organization's performance in delivering workforce development, education, and training programs.**
  - Highlight outcomes achieved in past programs (e.g., employment rates, credential attainment, retention), and your experience meeting performance benchmarks.
  - Discuss the qualifications and experience of key staff, especially those in supervisory roles.
  - Describe your organization's financial health and technical capacity, including your ability to manage funds, utilize technology (e.g., AI tools), and comply with reporting requirements.
  - If your organization has previously contracted with EWIB, performance will be reviewed using internal records. If not, include a completed Experience Report (Attachment D) with your proposal.
  - Address any challenges or contract issues encountered in the past, and the steps taken to resolve them.



Please complete Attachment E – Reference Form.

**E. Budget (20 Points)**

**BUDGET NARRATIVE & COST JUSTIFICATION**

- **Provide a detailed explanation of how your organization developed the proposed program budget.**
  - Identify the specific services and costs included in the Budget Proposal (Attachment C).
  - Distinguish between costs covered by EWIB funding and those supported through in-kind contributions, leveraged funds, or partnerships.
  - Indicate the projected cost per participant (if applicable) and explain how that figure was calculated.
  - Describe how technology will be used to enhance efficiency and reduce costs.
  - Clearly state the amount and percentage of any proposed profit or indirect costs.
  - Ensure all budget elements are fully explained and justified to demonstrate cost allowability, necessity, and alignment with program goals.

**BUDGET COMPLIANCE & COST REASONABLENESS**

- **When preparing your budget, include only those costs that are allowable, necessary, and reasonable under federal regulations.**
  - All proposed costs must comply with the OMB Uniform Guidance (2 CFR 200), including cost principles and audit requirements.
  - Provide a clear methodology for how each line item was calculated.
  - Be prepared to submit documentation or supporting data to verify the basis for cost estimates, if requested.
  - Proposals will be assessed for cost-effectiveness, completeness, consistency with historical cost trends, and alignment with similar proposals submitted to EWIB.
  - Any proposed contingencies must be specifically identified and justified.
  - Incomplete, unsubstantiated, or excessive cost estimates may impact the overall score of the proposal.

**F. Implementation Plan (10 Points)**

- **Describe your organization's readiness to launch the proposed program upon contract award.**
  - What instructional materials, equipment, and staff resources are already in place to support rapid implementation?
  - Identify any additional start-up activities required (e.g., equipment or supply purchases, staff recruitment, training, system setup).
  - Provide a realistic timeline for completing these preparatory activities, including key milestones.
  - Indicate how soon after the contract award your organization will be ready to begin delivering program services.
  - Explain how your organization will ensure a smooth, timely, and fully compliant launch, including any contingency planning if delays occur.

**Note:** EWIB does **not** pay for any expenses incurred prior to the execution of a contract.

EWIB monitors all programs at least once during the contract period. Contractors may be required to provide documentation of expenses as related to the negotiated budget.

**G. Collaborative Proposal with Multiple Agencies (5 bonus points)**

To qualify for five (5) point bonus as a Collaborative Proposal with multiple agencies, proposer must describe the partners in the Collaborative, which is the lead partner to receive funds, duties and responsibilities of each partner, value the system receives from the collaboration, and includes letters of support.



## Section VII: Solicitation Provisions

### A. Proposal Submission Instructions/Format

Proposals must be assembled in the following order:

1. **Attachment A** – Request for Funds Application Cover Sheet. This should be the cover page of the proposal.
2. **Proposal Narrative** (*Statement of Work*) including Executive Summary/Program Abstract. The Narrative should begin with a Table of Contents, followed by a one (1) page Executive Summary/Program Abstract, and then present the necessary information in the **sequence outlined in – Specifications/Statement of Work** (*Design, Program Services, Performance Outcomes*)
3. **Attachment B** – Evaluation Tool
4. **Attachment C** – Budget Proposal (*Budget Summary Form & Budget Detail*)
5. **Attachment D** – Experience Report
6. **Attachment E** – Reference Form
7. **Letters of Support**
8. **Attachment F** – Definitions
9. **Attachment G** – Outcomes for JFES Participants
10. Other miscellaneous attachments such as references, examples of curricula, subcontracts, endorsements, reports.

**At least one (1) copy of the proposal should be in loose-leaf form (not stapled or bound) and easily accessible for photocopying.**

### B. Evaluation Factors – Proposal Rating Criteria

A series of statements reflecting each of the areas covered under the selection criteria are included in the Evaluation Tool (***Attachment B***).

**Proposals will be rated according to the following criteria: Point Value**

1. Design, Program Services, Performance Outcomes	30
2. Leveraging of Resources and Community Support	10
3. Organizational and Administrative Capacity	10
4. Performance History	20
5. Budget	20
6. Implementation Plan	10
<b>TOTAL</b>	<b>100 points</b>
<b>Collaborative Bonus (5 pts)</b>	<b>5 points</b>
<b>Grand Total</b>	<b>105 points</b>

## Section VIII: ATTACHMENTS

A. Proposal Submission Check List

B. RFP Attachments

- i. Attachment A – *Request for Funds Application Cover Sheet*
- ii. Attachment B – *Evaluation Tool*
- iii. Attachment C – *Budget Proposal*
- iv. Attachment D – *Experience Report*
- v. Attachment E – *Reference Form*
- vi. Attachment F – *Definitions*
- vii. Attachment G – *Outcomes for JFES Participants*

# PROPOSAL SUBMISSION CHECKLIST

Proposals must be assembled in the following order: *(Check if item is enclosed)*

- ☐ **I. Attachment A – Request for Funds Application Cover Sheet.** *(This should be the cover page of the proposal)*
- ☐ **II. Proposal Narrative** *(Statement of Work)* including:
  - a. Table of Contents
  - b. Executive Summary/Program Abstract
  - c. Section IV – Statement of Work *(Check One)*
    - ☐ WIOA Adult/Dislocated Worker Services ~ Workforce Development & Placement Unit
    - ☐ JFES Programs for TANF Recipients
- ☐ **III. Attachment B – Evaluation Tool**
- ☐ **IV. Attachment C – Budget Proposal**
  - ☐ Budget Summary Form
  - ☐ Budget Detail
- ☐ **V. Attachment D – Experience Report** *(if applicable)*
- ☐ **VI. Attachment E – Reference Form**
- ☐ **VII. Letters of Support**
- ☐ **VIII. Other Miscellaneous Attachments** *(such as examples of curricula, subcontracts, endorsements, reports)*

# REQUEST FOR FUNDS APPLICATION COVER SHEET

## Eastern CT Workforce Investment Board Program Year 2025 – 2026 Request for Proposals

**Due Date: September 12, 2025 @ 4:00 p.m.**

Name of Lead Agency/Organization \_\_\_\_\_

Mailing Address \_\_\_\_\_

Contact Person \_\_\_\_\_

Program Name \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

E-Mail \_\_\_\_\_

Program Description: *Briefly describes the program (i.e., type of services)*

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**Service:** *(A separate proposal is required for each category)*

☐ **Category 1** – WIOA Adult, Dislocated Worker, Youth Services

☐ **Category 2** – JFES Programs

Total Enrollment Level\*: \_\_\_\_\_

Proposed Cost Per Participant\*: \_\_\_\_\_

Disclosure of Financial Relationship with the EWIB Board Members or Staff: Please Identify Names and Title Below

Name & Title \_\_\_\_\_

Check Here if None: \_\_\_\_\_

*To the best of my knowledge and belief, all information in this application is true and correct, the document has been duly authorized by the governing body of the applicant, and the applicant will comply with the attached assurances if the assistance is awarded.*

Signature of Authorized Representative \_\_\_\_\_

Telephone Number \_\_\_\_\_

Date \_\_\_\_\_

Typed Name of Authorized Representative \_\_\_\_\_

Title of Authorized Representative \_\_\_\_\_

## EVALUATION TOOL

**Reviewer's Name:** \_\_\_\_\_

**Activity/Service(s) Proposed:** \_\_\_\_\_

**Proposer:** \_\_\_\_\_

**Date Rated:** \_\_\_\_\_ **Score:** \_\_\_\_\_ **Rank:** \_\_\_\_\_

**Scoring:** Rating Criteria Points: 100 *(Additional 5 points available for collaboration with other agencies)*

**Raters:** Evaluate each of the following areas and record your response *(score)* in the blank provided at the end of each question or statement. Explain your evaluation in the Comments section.

### Score Rating Criteria

#### **Design, Program Services, Performance Outcomes:**

##### **Category 1 - WIOA (30 Points)**

**Points Given** \_\_\_\_\_

1. Quality of Proposed Outcomes: The Proposer presents clear, measurable, and realistic goals. Proposed performance outcomes meet or exceed the benchmarks established by EWIB.
2. Service Approach and Appropriateness: The proposed methodologies and service approaches are appropriate for the target population(s), including those with barriers to employment.
3. Use of Technology & Tools: The proposal demonstrates a thoughtful and effective use of assessment tools, case management systems, and technologies (e.g., CTHires, AI) to improve service delivery and track performance.
4. Innovation and Efficiency: The Proposer incorporates innovative practices or technologies that improve efficiency, effectiveness, and participant experience, while demonstrating cost-consciousness.
5. Staff Qualifications & Readiness: The proposal reflects strong staff qualifications, including experience with eligibility determination, case management, workshop facilitation, employer engagement, and customer service. Bilingual capacity and cross-training are clearly addressed.
6. Collaboration and Community Integration: The Proposer demonstrates the ability to work collaboratively within a multi-agency environment and leverages knowledge of local resources to benefit participants.
7. Monitoring and Accountability: There is a clear plan for ongoing monitoring of program performance, timely follow-up, and responsiveness to program expectations, including participation in meetings and flexible staffing.

##### **Category 2 - JFES (30 Points)**

**Points Given** \_\_\_\_\_

1. Quality of Proposed Outcomes: Goals are specific, measurable, and aligned with EWIB benchmarks. Target outcomes are realistic and clearly defined.
2. Service Approach and Appropriateness: Approach is well-suited to high-need populations and includes effective strategies for addressing barriers to employment.
3. Use of Technology & Tools: Demonstrates effective use of tools (e.g., CTHires, CASAS, AI) for assessment, data entry, workflow, and client engagement.
4. Innovation and Efficiency: Incorporates innovative practices or technologies that improve service quality, efficiency, and participant satisfaction.

5. Staff Qualifications & Readiness: Staff have relevant experience and credentials. Proposal addresses bilingual access, training, and capacity to manage caseloads.
6. Collaboration and Community Integration: Shows strong knowledge of local resources and ability to integrate services across AJC sites and community partners.
7. Monitoring and Accountability: Includes clear plans for tracking performance, meeting deadlines, maintaining data accuracy, and participating in required trainings and meetings.
8. Employment Focus and Job Development: Demonstrates strong capacity in job search assistance, employer engagement, and developing supported work experiences.

**Leverage of Resources & Community Support (10 Points)** Points Given \_\_\_\_\_

1. Strength of Collaborative Partnerships: Proposal demonstrates well-established, active partnerships with relevant organizations that enhance service delivery and participant access.
2. Role and Contribution of Partners: Clearly describes each partner's role and the value they add (e.g., referrals, shared space, support services). Partnerships are relevant and thoughtfully integrated.
3. In-Kind and External Resource Commitment: Provides meaningful and quantified in-kind contributions or external funding that support program implementation and sustainability.
4. Alignment and Impact of Leveraged Resources: Resources and partnerships are aligned with program goals and clearly contribute to expanded capacity, improved outcomes, or long-term program success.

**Organizational & Administrative Capacity (10 Points)** Points Given \_\_\_\_\_

1. Staffing Structure & Capacity: Proposal presents a qualified staffing plan with clear roles, recruitment and training strategies, and demonstrated ability to hire and scale as needed.
2. Management Plan & Oversight: Proposal outlines a strong management structure with clear lines of authority, systems for oversight, and procedures to ensure quality service delivery and contract compliance.
3. Program Monitoring & Performance Tracking: Proposal describes robust monitoring systems, performance tracking, and quality assurance procedures that support continuous improvement and client success.
4. Fiscal Controls & Financial Management: Proposal demonstrates sound fiscal management, with strong internal controls, accurate and timely reporting systems, and proper safeguards for managing public funds.

**Performance History (20 Points)** Points Given \_\_\_\_\_

1. Relevant Experience & Past Performance: Proposal demonstrates strong performance in delivering education, training, or employment programs, with clear evidence of meeting or exceeding past contractual goals.
2. Administrative Infrastructure & Recordkeeping: Organization has adequate administrative systems and procedures in place, including reliable recordkeeping and a willingness to comply with monitoring and audit requirements.
3. Staff Qualifications & Organizational Capacity: Key staff are well-qualified, particularly in supervisory roles, and the organization demonstrates the technical and financial capacity to effectively manage program operations.
4. Responsiveness to Performance Challenges: Proposal reflects the organization's ability to identify and address underperformance or prior challenges, with evidence of corrective action and continuous improvement.

**Budget (20 Points)** Points Given \_\_\_\_\_

1. Cost Justification & Transparency: Budget narrative clearly explains and justifies all proposed costs, including cost per client, indirect costs, and use of in-kind contributions or leveraged resources.
2. Cost-Effectiveness: Proposed budget reflects a reasonable cost for services, demonstrates efficient use of funds, and aligns with expected outcomes and industry standards.

3. Compliance with Federal Guidelines: Budget complies with OMB Uniform Guidance (2 CFR 200), includes only allowable and necessary costs, and provides clear methods for calculating line items.
4. Use of Technology & Resource Leveraging: Proposal identifies thoughtful use of technology to improve cost-efficiency and outlines how public-private partnerships or in-kind support will supplement program funding.

**Implementation Plan (10 Points)**

**Points Given** \_\_\_\_\_

1. Start-Up Readiness: Proposal demonstrates strong organizational readiness, with key materials, equipment, and staffing already in place to enable a timely program launch.
2. Implementation Timeline & Milestones: Proposal includes a clear, realistic timeline for completing preparatory activities and identifies critical milestones to ensure an on-time start of services.
3. Planning & Risk Mitigation: Proposal outlines thoughtful strategies to ensure a smooth launch, including contingency plans to address potential delays or operational challenges.

**COLLABORATION BONUS (5 Points)**

**Points Given** \_\_\_\_\_

## BUDGET PROPOSAL

Please submit a complete budget for the program submitted. A **detailed budget narrative** for each line must also be included. This is a cost reimbursement contract and has a 10% cap on Administration. If an indirect cost rate is being utilized, it must be a federally recognized and a copy of the agreement must be attached, along with the following rate proposal documents:

- Statement of Total Cost
- Allocation of Personnel Cost Worksheet

The budget may not contain program costs not directly related to the provision of services to program participants. All program costs shall be direct in nature and shall be documented in the budget narrative to show the need and direct nature of each cost.

Programs must describe their capacity to supervise proposed staff. The supervisor will be the point of contact for their EWIB staff.

Identify other funds and/or in-kind resources that will be provided to offset costs being requested.

Budget forms (*part of Attachment C*) must be completed & included.



## Budget ~ Administration

Line Item	Funds Requested	Match/In-Kind
<b>Personnel</b>		
Salaries*		
Fringe Benefits		
Mileage & Travel		
Other		
<b>Total Personnel</b>		
<b>Non-Personnel</b>		
Supplies*		
Printing*		
Postage*		
Telephone		
Maintenance		
Equipment Rental*		
Equipment Purchase*		
Space Rental*		
Insurance		
Utilities		
Indirect Costs**		
Audit		
Legal		
Accounting		
Profit**		
Other		
<b>Total Non-Personnel</b>		
<b>Total Administration</b>		

\* Must be explained in detail

\*\* Must have a federally approved in-direct cost rate plan all other overhead must be itemized

## Budget ~ Programs

Line Item	Funds Requested	Match/In-Kind
<b>Personnel</b>		
Salaries		
Fringe Benefits		
Mileage & Travel		
Other		
Staff Incentive		
<b>Total Personnel Costs</b>		
<b>Non-Personnel Costs</b>		
Supplies		
Materials		
Books		
Teaching Aids		
Postage		
Telephone		
Printing		
Equipment Rental		
Equipment Purchase		
Space Rent		
Utilities		
In-Direct Costs		
Profit		
<b>Total Non-Personnel</b>		
<b>Total Programs</b>		
<b>Grand Total Administration &amp; Services</b>		

## Budget Summary

Line Item	Annual Expense*	Administration	Program	Match/ In-Kind
<b>Personnel</b>				
Salaries				
Fringes				
Mileage				
Travel				
Other				
<b>Total Personnel</b>				
<b>Non-Personnel</b>				
Supplies				
Printing				
Postage				
Telephone				
Maintenance				
Equipment Rental				
Equipment Purchase				
Space Rent				
Insurance				
Utilities				
Books				
Materials				
Teaching Aids				
In-Direct Costs				
Profit				
Other				
<b>Total Non-Personnel</b>				
<b>Grand Total</b>				

\* Annual Expense = Organization's actual annual cost for the item

Other – Must be described on an attached schedule or in non-personnel detail.

## Personnel ~ Detail

List all positions included and the total amount of wages requested for each cost category. All allocations of salary across cost categories must be supported by matching job descriptions and a cost allocation plan.

Job Title & Staff Member	# Pay Periods/ Year	Amt. of Pay/Period	Total Col. 2x3	%	Admin Col. 4x5	%	Program Col. 4x7	%	Other WIOA or Non-WIOA Pay (Specify) Col 4-(6 or 8)
<b>Totals</b>				\$		\$			

Transfer to the appropriate cost categories on the budget worksheets  
Note that salaries being supported by various funding sources must be properly allocated to all funding sources.

Legend:

Column	
1	Title & name, if possible, of individual to be charged to this proposal
2	The # of pay periods a year for the individual
3	Amount of pay per period
4	Total wages for the year for the position
5	The percentage of the individual's/position's pay charged to administration
6	Amount of wages charged to administration
7	The percentage of the individual's/position's pay to be charged to the program
8	Amount of wages to be charged to the program
9	The percent of the individual's salary not being charged to the project
10	The amount of the individual's salary not being charged to the project

## Fringe Benefit Worksheet

Enter Fringe Benefits for positions on Job Description and Worksheet above:

Job Title & Staff Member	Admin	Program	Other WIOA or Non-WIOA Fringe	Total Fringe
<b>Total Fringe Benefits</b>				

## Description of Non-Personnel Costs

Itemize each item in your budget and provide a cost breakdown.

Example:

1. Training – Travel

*Staff in town mileage*

*2 staff traveling approximately 50 miles/week or a total of \_\_\_\_ miles at \$. xx/mile for a total budget request of \$\_\_\_\_\_.*

Item Description	Cost Category	Unit Cost	Quantity	Total

Signature of Fiscal Officer attesting to the accuracy of the budget estimates provided in the proposal:

\_\_\_\_\_  
Fiscal Officer

\_\_\_\_\_  
Date

## EXPERIENCE REPORT

**Name of Organization** \_\_\_\_\_

**Address of Organization** \_\_\_\_\_

**Contact Person** \_\_\_\_\_ **Phone** \_\_\_\_\_

**Describe the experience your organization has had in operating similar programs.**

**1. Type of Program** \_\_\_\_\_ **Year** \_\_\_\_\_

**Location of Program** \_\_\_\_\_

**Total Project Funds Expended** \_\_\_\_\_ **Number Enrolled** \_\_\_\_\_

**Number of Successful Completions** \_\_\_\_\_ **Actual Cost Per Participant** \_\_\_\_\_

**Funding Source** \_\_\_\_\_

**Funding Source Contact Person** \_\_\_\_\_ **Phone** \_\_\_\_\_

**2. Type of Program** \_\_\_\_\_ **Year** \_\_\_\_\_

**Location of Program** \_\_\_\_\_

**Total Project Funds Expended** \_\_\_\_\_ **Number Enrolled** \_\_\_\_\_

**Number of Successful Completions** \_\_\_\_\_ **Actual Cost Per Participant** \_\_\_\_\_

**Funding Source** \_\_\_\_\_

**Funding Source Contact Person** \_\_\_\_\_ **Phone** \_\_\_\_\_

**Comments:**



## REFERENCE FORM

The below-named organization is in the process of responding to a Request for Proposal (RFP) released by the Eastern CT Workforce Investment Board (EWIB). This RFP is soliciting proposals from agencies interested in presenting their experience, capacity, capability, technical and financial qualifications to provide Title I Career Services for Adults, Dislocated Workers, and Youth under the Workforce Innovation and Opportunity Act of 2014 and services to JFES recipients. One of the RFP requirements is that the proposer must have this form completed by at least two (2) organizations which can comment on the proposer's capacity to provide the services proposed. Please complete & sign the reference form & fax it to Carol LaBelle at (860) 859-4110, attention RFP for Title I Career Services; or sign, scan, and e-mail it to: Carol LaBelle at [labellec@ewib.org](mailto:labellec@ewib.org).

Proposer Organization: \_\_\_\_\_

Proposer Representative or Contact Signing Below for the Organization: \_\_\_\_\_

The undersigned individual certifies that they are authorized to represent the above-named organization: \_\_\_\_\_

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

### For Completion by the Organization Providing the Reference

**Name of Person Completing This Form:** \_\_\_\_\_

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

**Signature:** \_\_\_\_\_

**Please check all services provided by the Proposer Organization for your entity:**

<input type="checkbox"/>	Eligibility Determination
<input type="checkbox"/>	Assessment
<input type="checkbox"/>	Development of Individual Service Strategy
<input type="checkbox"/>	Case Management & Counseling
<input type="checkbox"/>	Data Management
<input type="checkbox"/>	Work Experience
<input type="checkbox"/>	Citizenship Training
<input type="checkbox"/>	Occupational Skills Training
<input type="checkbox"/>	Referral to Training
<input type="checkbox"/>	Basic Skill Remediation / GED Preparation ( <i>Please Circle</i> )
<input type="checkbox"/>	Job Placement
<input type="checkbox"/>	Job Search Assistance
<input type="checkbox"/>	Career Pathways
<input type="checkbox"/>	Working with Individuals with Barriers to Employment, Including Welfare Recipients
<input type="checkbox"/>	Other ( <i>Please Describe</i> )

**Please check the boxes which best describes the population(s) served by Proposer.**

*(Check all which apply)*

<input type="checkbox"/>	Youth Ages 19-21
<input type="checkbox"/>	Low-Income Individuals
<input type="checkbox"/>	Basic Skills Deficient Individuals
<input type="checkbox"/>	Individuals with a Documented Disability
<input type="checkbox"/>	Dislocated Workers
<input type="checkbox"/>	Long-Term Unemployed
<input type="checkbox"/>	English Language Learners
<input type="checkbox"/>	Ex-Offender
<input type="checkbox"/>	Displaced Homemakers
<input type="checkbox"/>	Veterans
<input type="checkbox"/>	Welfare Recipients
<input type="checkbox"/>	Food Stamp Recipients
<input type="checkbox"/>	Other: <i>(Please Describe)</i>

**During what period of time was this work performed? *(Check all which apply)***

<input type="checkbox"/>	Program Year 2023 - 2024
<input type="checkbox"/>	Program Year 2022 - 2023
<input type="checkbox"/>	Program Year 2021 - 2022
<input type="checkbox"/>	Program Year 2020 - 2021
<input type="checkbox"/>	Program Year 2019 - 2020
<input type="checkbox"/>	Program Year 2018 - 2019

**Service & Cost Levels**

Total # of Participants Served: \_\_\_\_\_ Cost Per Participant: \$ \_\_\_\_\_

**Please rate the following specific factors relative to this organization's effectiveness, on a scale of 1 – 5, with 5 being the highest/best.**

Quality of Services:	1__	2__	3__	4__	5__
Delivering the services as Provided Under their Agreement:	1__	2__	3__	4__	5__
Proposer Met All Performance Objectives:	1__	2__	3__	4__	5__
Communication with EWIB Staff:	1__	2__	3__	4__	5__
Timeliness <i>(meeting deadlines &amp; adherence to contract schedule)</i> :	1__	2__	3__	4__	5__
Day-to-day Responsiveness:	1__	2__	3__	4__	5__
Hiring & Retaining Competent Staff:	1__	2__	3__	4__	5__
Supervising & Motivating Staff:	1__	2__	3__	4__	5__
Assessment, Case Management, Career Plan Development, & Referral/Provision of Appropriate Services to Participants:	1__	2__	3__	4__	5__
Management of Case Files, and Case Notes Both Hard Copy and System Copy, Including Data Entry:	1__	2__	3__	4__	5__
Establishing & Maintaining Effective Working Relationships with Community Partners:	1__	2__	3__	4__	5__
Continuous Quality Improvement, Including Developing					

and Implementing Corrective Action Plans: 1\_\_\_ 2\_\_\_ 3\_\_\_ 4\_\_\_ 5\_\_\_

Administrative & Financial Management: 1\_\_\_ 2\_\_\_ 3\_\_\_ 4\_\_\_ 5\_\_\_

Conforming to Contract Requirements & to Standards of  
Good Business Practices: 1\_\_\_ 2\_\_\_ 3\_\_\_ 4\_\_\_ 5\_\_\_

Forecasting & Controlling Costs: 1\_\_\_ 2\_\_\_ 3\_\_\_ 4\_\_\_ 5\_\_\_

Willingness to Cooperate with & Assist When Confronted  
with Unanticipated Circumstances: 1\_\_\_ 2\_\_\_ 3\_\_\_ 4\_\_\_ 5\_\_\_

**How Would You Rate Your Overall Experience with this Proposer?**

1\_\_\_ 2\_\_\_ 3\_\_\_ 4\_\_\_ 5\_\_\_

**Please respond to the following:**

To the best of your knowledge:	Yes	No
Has Proposer failed to complete any contract with your organization?		
Has any contract between Proposer & your organization been terminated due to alleged poor performance or default?		
Has any audit or a contract/program operated by Proposer included questioned costs that have been, or are subject to repayment?		
Would you say this respondent ( <i>and its key staff</i> ) has conducted itself with a high degree of integrity?		
Would you contract with the Proposer organization again?		

**Provide any general comments you feel you would like to add:**

**Please return to:**

Carol LaBelle, Sr. Director of Programs & Special Projects, EWIB, 108 New Park Avenue, Franklin, CT 06254 / Fax: (860) 859-4111 or email [labellec@ewib.org](mailto:labellec@ewib.org)

The Eastern CT Workforce Investment Board, Inc. thanks you for taking the time to complete this reference form.

## DEFINITIONS

### **American Job Center (AJC)**

A Center that provides a wide range of employment and training services to job seekers and employers. The AJCs offer support such as career counseling, job search assistance, resume building, training programs, and access to job listings. AJCs are part of a nationwide AJC network designed to connect individuals with the resources they need to find employment and advance their careers, while also helping employers recruit qualified workers. AJC may also be referred to as a “One-Stop” Center. In partnership with the CT Department of Labor, EWIB oversees the operations of the three (3) regional American Job Center-East One-Stop Career Centers located in Danielson, Montville, and Willimantic.

### **Assessment**

Comprehensive and specialized review of an individual’s skill levels and service needs. May include diagnostic testing and use of other assessment tools, and in-depth interviewing and evaluation to identify employment barriers and appropriate goals.

### **Barriers to Employment**

Conditions that may make employment difficult for certain individuals. Individuals with such barriers may include, but is not limited to single parents, displaced homemakers, public assistance recipients, older workers, substance abusers, teenage parents, veterans, those with limited English-speaking ability, a criminal record, a lack of education or work experience, & those with transportation or childcare difficulties.

### **Business Services Team**

A group of professionals overseen by EWIB & the Department of Labor that works directly with employers to meet their workforce needs. This team provides a range of services to businesses, including recruitment assistance, workforce training programs, access to labor market information, and support with employee development.

### **Case Management**

Services that enable an individual to receive WIOA or JFES-funded training and/or employment services. Services are:

- Development and modification of Individual Employment Plans (*IEP*)
- Continued interaction relating to vocational & educational interests and abilities, & barriers to participation Referral to career services, education, training and employment programs, community & social services
- Assistance in enrolling in education and training programs
- Monitoring individual progress towards completion of an IEP
- Processing supportive and needs-related payments.

### **Career Services**

Services available to all persons who seek assistance at any One-Stop Center. This may include job search and placement assistance, access to labor market information, training information, and information about filing for unemployment, public assistance, childcare, or transportation assistance.

Career services are categorized as “*registered*” and “*unregistered*.”

Registered career services initiate participation in the WIOA program. Individuals receiving registered career services are subject to WIOA performance measures. Receipt of registered career services allows the participant to receive intensive training services.

Unregistered career services do not initiate participation in the WIOA program.

### **Counseling**

Guidance or assistance to identify and develop a participant's vocational, educational or employment goals and the means to achieve those goals, or to assist with the solution to barriers that may prevent a person from accomplishing those goals. Counseling includes career counseling and guidance counseling, referral to substance abuse intervention, family and social service agencies, and assistance addressing any barrier to employment. Counseling may be provided on an individual basis and/or in a group setting.

### **Credential**

An umbrella term which includes nationally recognized degrees of higher education, high school and equivalent diplomas, and certificates.

### **CTHIRE Business system**

Data Management System used to manage caseloads, document employment plans, tracking and reporting WIOA & JFES customer progress, and communicating with staff from other entities. CTHIRE system will be accessible by a personal computer with Microsoft Internet Explorer Version 6.0.

### **Customized Training**

Training designed to meet the special requirements of an employer (*including a group of employers*), that is conducted with a commitment by the employer to employ, or in the case of incumbent workers, continue to employ, an individual upon successful completion of the training; and for which the employer pays for not less than 50% of the cost of the training. Also referred to as customized job training (*CJT*).

### **Dislocated Worker**

A person who has been certified by the Department of Labor as being a dislocated worker by meeting one of the following criteria:

- a. has been terminated or laid-off from a job, or who's received a notice of termination or layoff & is eligible for or has exhausted entitlement to unemployment payments; or has been employed for a duration sufficient to demonstrate attachment to the workforce, but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that were not covered under a State unemployment compensation law; & is unlikely to return to a previous industry or occupation.
- b. has lost a job or has received a notice of termination or layoff due to a permanent closure or a big layoff;
- c. working at a facility where the employer has announced that it will close within 180 days;
- d. was self-employed but is unemployed because of the local economy or because of natural disasters; or is a displaced homemaker.

### **Displaced Homemaker**

A person who has been doing unpaid work for family members in the home and who:

- a. has been dependent on the income of another family member but is no longer supported by that income; and,
- b. is unemployed or underemployed and is having difficulty in finding a job or getting a better job.

### **Eastern CT Workforce Development Area**

A region comprised of 41-towns in Eastern CT designated to receive federal or state funding to support workforce development initiatives. EWIB oversees funding & policy development within this region.

**Eligible Training Provider List (ETPL)**

A statewide collection of providers that are approved to give services through the One-Stop system.

**Exit**

Ending of involvement in the WIOA or JFES program.

**Exit Date**

The date on which the last service funded by WIOA, JFES or a One-Stop partner program is received by a participant. Once a participant has not received such a service for 90 consecutive calendar days and has no planned gap in service, the date of exit is applied retroactively to the last day on which the participant received a service.

**First Date of Service**

The date on which an individual begins receiving WIOA-funded services following a determination of eligibility to participate, or for JFES, the participation of the customer in the JFES orientation.

**Follow-Up**

The tracking of an individual who exited the WIOA program, for a period of four (4) calendar quarters, to:

- obtain information regarding status in employment, post-secondary education, advanced training, or apprenticeship.
- obtain information regarding average hourly wage and job retention.
- address work-related problems and career development and/or advancement issues.
- provide services as appropriate to help the individual maintain and/or obtain employment.

**In-School Youth**

Youth must be between the ages of 16 and 21, a high school junior or senior from a low-income family, and meet at least one (1) of the following six (6) barriers:

- Deficient in basic literacy skills
- Homeless, runaway, foster care or has aged out of foster care system;
- Pregnant or parenting;
- Offender;
- Youth with a disability
- English language learner;
- Is a low-income, at-risk youth who requires additional assistance to enter or complete an educational program or to secure or hold employment.

**Incumbent Worker Training**

Training is provided to employees to upgrade skills with the intent of maintaining or furthering employability.

**Individual Employment Plan (IEP)**

A plan developed by the participant and the case manager to identify the participant's employment goals, the appropriate achievement objectives, and the appropriate combination of services for the participant to achieve the employment goals.

**Individual Service Strategy (ISS)**

An assessment of skills & agreement of goals decided between a Youth participant & Youth staff counselor that sets out a plan for the youth to make progress towards his/her educational & employment goals.

**Individual Training Account (ITA)**

An expenditure account established by the local Workforce Investment Board, on behalf of a participant, provides funds for vocational training listed on the Eligible Training Provider List.

**Individual with a Disability**

An individual with any disability as defined in Section 3 of the Americans with Disabilities Act.

**Intake**

The initial process for screening individual applicants to determine program suitability and eligibility up to the point of registration. The process includes:

- Providing information about the program and related services
- Determining employability and training needs
- Reviewing vocational interests, abilities, education and work experience, income requirements, and personal circumstances
- Determining WIOA eligibility, or other program eligibility, as applicable

**Intensive Services**

Services available to adults & dislocated workers who are still unable to gain employment, or who are employed & need services to get a better job. Examples of services include career counseling & planning, internships, case management.

**Internship**

A program in which a participant is placed into a setting of supervised, practical vocational training with an employer.

**JFES**

Jobs First Employment Services, a program funded through local Workforce Investment Boards, is designed to provide Case Management services to eligible TANF clients to help them move from Welfare-to-Work.

**Job Development**

The process of marketing a specific participant to a specific employer includes informing the employer of the participant's skills and abilities and requesting an interview on behalf of the participant. Job development can also include assisting employers in developing openings based on the employer's needs.

**Job Search Assistance**

Provision of a wide range of services to assist an individual secure employment such as job clubs, job referrals, career counseling, and workshops offered within the AJCs.

**Labor Market Information (LMI)**

Data and analysis about the workforce and the economy, including employment trends, wages, job openings, industry growth, unemployment rates, and skill requirements.

**Literacy**

The ability to read, write, and speak in English at a level of proficiency necessary to function on the job and in society.

**Low-Income Individual**

An individual that:

- a) receives, or in the past six (6) months has received, or is a member of a family that is receiving or in the past six (6) months has received, assistance through SNAP, cash payments under a Federal, State, or local income-based public assistance program such as TANF (Temporary Assistance for Needy Families), SSI (Supplemental Security Income), General Assistance (GA) or Refugee Cash Assistance (RCA);



- b) received an income, or is a member of a family which received a total family income for the 6-month period prior to application for the program involved (*exclusive of unemployment compensation, child support payments, and payments described in subparagraph (A), and old-age and survivors insurance benefits received under section 202 of the Social Security Act (42 U.S.C. 402)*) that, in relation to family size, does not exceed the higher of 200% of the lower living standard income level, for an equivalent period;
- c) receives or is eligible to receive a free or reduced-price lunch under the Richard B. Russell National School Lunch Act;
- d) qualifies as a homeless individual under Sub-Sections (a) and (c) of Section 103 of the Steward B. McKinney Homeless Assistance Act (42 U.S.C. 11302);
- e) is a foster child on behalf of whom State or local government payments are made; or
- f) in cases permitted by regulations promulgated by the Secretary of Labor, is an individual with a disability whose own income meets the requirements of a program described in subparagraph (a), or of subparagraph (b), but who is a member of a family whose income does not meet such requirements.

### **Lower Living Standard Income Level**

That income level (*adjusted for regional, metropolitan, urban, and rural differences and family size*) is determined annually based on the most recent lower living family budget issued by the Secretary.

### **Monitoring**

The process of reviewing and assessing the implementation and effectiveness of the services and programs provided. This includes ensuring that service providers are complying with regulations, meeting performance goals, and delivering quality services to job seekers and employers. Monitoring involves evaluating financial management, program outcomes, adherence to policies, and the overall impact of the services to ensure they align with standards and objectives.

### **Non-Traditional Employment**

Jobs or types of work for which persons from one gender make up less than 25 percent of the people employed in each job or field of work.

### **Occupational Skills Training**

Vocational education is designed to provide individuals with the technical skills and information required to perform a specific job or group of jobs.

### **Offender**

Any adult or youth who has been involved in the criminal justice process for whom services under WIOA may be helpful or who needs assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction.

### **On-the-Job Training (OJT)**

Training by an employer that is provided to a paid participant while engaged in productive work in a job that:

- a) provides knowledge or skills essential to the full and adequate performance of the job;
- b) provides reimbursement to the employer 50% to 75% of wages of the participant, for the extraordinary costs of providing the training and additional supervision related to the training; and
- c) is limited in duration as appropriate to the occupation for which the participant is being trained, considering the content of the training, the prior work experience of the participant, and the service strategy of the participant, as appropriate.

### **Out-of-School Youth**

A youth participant who at the time of certification is between the ages of 17-24:

- a) drop-out.
- b) Who is within age of compulsory school attendance, but has not attended school for at least the most recent complete school CY quarter;
- c) A recipient of a secondary school diploma or its recognized equivalent who is a low-income individual AND basic skills deficient OR English language learner;
- d) Juvenile or Adult justice system individual;
- e) Homeless, runaway, in foster care or has aged out of the foster care system, eligible for assistance under the Social Security Act or an individual who is an out-of-home placement;
- f) Pregnant/parenting
- g) Youth with a disability
- h) Low income who requires additional assistance to enter or completed an educational program or to secure or hold employment.

### **Outreach**

Efforts by program staff to encourage individuals in the service delivery area to participate in WIOA.

### **Participant**

An individual who has been determined eligible for WIOA or JFES and who is receiving services.

### **Pre-Vocation Services**

Services to develop skills, other than vocational skills, to prepare individuals for employment and training. Such skills include literacy and numeracy, communication, interviewing, punctuality, personal grooming and maintenance skills, and professional conduct.

### **Registration**

Start and recording of actual participation in WIOA-funded intensive services.

### **Retention**

Employment of exited participants in each of the four quarters after the exit quarter.

### **Self-Sufficiency**

The ability to earn enough money to support oneself and dependents.

### **Service Provider**

An organization with the potential of providing services directly to EWIB or EWIB's customers. Service Providers may have financial partners (*subcontractors*) or non-financial partners (*collaborators*).

### **Supportive Services**

Services that are needed to help a person to participate in job training or job search or maintain employment such as assistance with transportation, health care, child/dependent care, temporary shelter, financial assistance, drug and alcohol abuse services, individual/ family counseling, services for individuals with disabilities.

### **TANF**

Temporary Assistance for Needy Families. This is a program funded by the State Department of Social Services which awards monthly cash stipends to eligible families. TANF clients may be referred to Board-funded JFES (*Jobs First Employment Services*) programs for case management services.

### **Training Services**

Education and employment training offered at no cost to eligible participants who have been unable to get a job after having received one or more core services and one or more intensive services. See also Individual Training Account (*ITA*).

**Unsubsidized Employment**

A job for which the employer pays all wages directly.

**Work Experience**

A planned structured learning experience that takes place in a workplace for a limited period of time. Work experience may be paid or unpaid. The workplace site may be in the private for-profit sector, the non-profit sector, or the public sector.

**Workforce Innovation & Opportunity Act (*WIOA*)**

WIOA is the national workforce preparation employment system designed to help job seekers and workers access employment, education, training, and support services to succeed in the labor market and match employers with skilled workers they need to compete in the global economy. WIOA supersedes the Workforce Investment Act (*WIA*) of 1998 amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973.

## OUTCOMES FOR JFES PARTICIPANTS

- 1) Contractor shall have a minimum of 37% of the regional JFES caseload that performed some work during SFY26.
  - a. JFES Participant performed some work such as: A part-time or full-time job during the program year.
- 2) Contractor shall have 20% of JFES Participants exceeding 100% of the Federal Poverty Level (FPL) during SFY26.
  - a. JFES Participant's Temporary Family Assistance (TFA) will not close.
  - b. JFES Participant has exceeded 100% of the FPL.
  - c. Exceeding the 100% of the FPL includes earnings from Unsubsidized and/or Subsidized employment.
    - i. Measures include the average number of hours worked and the hourly wage of Unsubsidized and/or Subsidized employment and how many Participants exceeded the target wage based on a 35 hour per week job and family size.
- 3) Contractor shall allocate a minimum of 3% of the total contract amount to Subsidized Employment activities.
- 4) Contractor shall have a minimum of 50% completion rate for JFES Participants enrolled in classroom or on-line vocational educational training.
  - a. Measure includes JFES Participants successfully completing the academic portion of the course and receiving a certificate. However, the JFES Participant will not be required to achieve an additional license required by the training vendor.
- 5) Contractor shall successfully implement Family Centered Coaching (FCC) strategies.
  - a. Measure will be evaluated based on a random sample of 24 cases reviewed by CTDOL.
  - b. 75% of the sampled cases shall contain evidence of Family Centered Coaching (FCC) strategies.