

NC Workforce Development Boards Directors Finance & Budgeting

Request for Proposal

This training will support directors in being able to understand and navigate the financial management and budgeting process for WIOA services and will include best practices, policy clarifications, CFRs, etc.

REQUEST FOR PROPOSALS

The development and facilitation of a one-day, in-person session on the Workforce Innovation and Opportunity Act (WIOA) finance and budgeting

INTRODUCTION

The North Carolina Association of Workforce Development Boards (NCAWDB) is the voice for workforce development in North Carolina. Comprised of 20 local workforce boards with over 500 members, the Association is dedicated to enhancing North Carolina's workforce by supporting local workforce development boards statewide. The NCAWDB Executive Director's Council (EDC) is comprised of the 20 Workforce Development Board Executive Directors and the Executive Director of NCAWDB.

Workforce Development Boards are the conveners of the workforce system on a local level in the state of North Carolina. Workforce Development Boards provide oversight, planning, and administration of the NCWorks Career Centers.

They are business-led and supported by local elected officials. The Boards are charged with bringing together industry, education, labor, community, government, and other stakeholders in the workforce to develop demand-driven strategies connected to regional economies and labor markets. They oversee local NCWorks Career Centers in partnership with the NCWorks Commission and the Division of Workforce Solutions to deliver workforce solutions, assist job seekers with improving their skills and finding jobs, and help businesses develop a qualified workforce.

As part of the NCAWDB, The Executive Directors Council (EDC) is a unified voice for the NC workforce development system and an instrumental partner in developing North Carolina's economic future.

PURPOSE/SCOPE OF WORK

The purpose of this Request for Proposal (RFP) is to solicit proposals from a qualified facilitator who can develop training that will support directors in being able to understand and navigate the financial management and budgeting for WIOA services. In general, this training should help workforce board directors gain a thorough understanding of how, when, and where to find WIOA information relevant to carrying out the WIOA law and adhering to North Carolina policies. The goal of the Executive Director's Council is to have this training delivered in early summer, 2024.

The Executive Directors Council Training Committee has identified several major areas that should be included in the training, as listed below. However, the proposal is expected to be comprehensive and cover pertinent areas to navigating the financial management and budgeting process for WIOA. The expectation is that at a minimum, the training will include best practices, policy clarifications, and CFRs. It is anticipated that this session will be highly interactive and engaging.

- Define WIOA funding streams, explain the allocations and timing of disbursements, funding parameters, allowable vs. disallowable costs, and relevant fiscal CFRs.
- Outline a simplistic guide to WIOA financials for all staff levels, to include navigating the CFR and basic accounting principles. Identify and share best practices for obligating funds, budgeting, forecasting, and tracking expenditures.
- Explain reporting requirements and provide a WISE system overview and tutorial.
- Offer insight into the external fiscal monitoring process and best practice options for internal use.

DELIVERABLES

Deliverables will include 1) preparatory materials for the training including the training outline and any pre-work, 2) an advance meeting with the EDC Training Committee to review training plans and the training outline, 3) training outline and proposed schedule 4) execution of the training on-site.

MINIMUM REQUIREMENTS:

Experience facilitating training sessions of a similar nature, positive references, and presentation of a sound plan for the stated scope of work. Preferred facilitator with thorough understanding of and/or experience in WIOA fiscal policies and expectations specific to North Carolina.

Please attach 3 references from organizations where similar training has been provided.

Executive DIRECTORS COUNCIL RESPONSIBILITIES:

The Executive Directors Council will provide the space, lunch, and reasonable A/V or other supplies needed for presentation, as available and agreed upon in advance.

LOGISTICS:

The training will be an in-person training session. Each training session will be recorded for future use, or the trainer may be required to present the information on a videotaped virtual session for future use by the Association.

BUDGET:

The anticipated contract type: price up to \$25,000 (includes travel, hotel, and expenses).

Unless stated otherwise in the statement of the work, the Contractor is responsible for providing equipment and/or supplies required to perform the services.

All deliverables provided to the NCAWDB, Executive Directors Council must be furnished for use without royalty or any additional fees.

EVALUATION CRITERIA AND SUBMISSION REQUIREMENTS:

NCAWDB Executive Directors Council strategic planning team will accept the proposal that presents the best value. All proposals will be evaluated against the following criteria. A proposal must contain the items listed in the Submission Requirements column in the following chart to be considered.

Evaluation Criteria	Submission Requirement	Weight
Proposed process and approach	A maximum 3-page written proposal explaining the process the Contractor will use to carry out the scope of work, including a sample training outline	45%
Experience	A brief description of prior similar work and professional references from similar past projects with phone and email contact information. CV/Resume of the proposed individual(s) to work on this activity.	35%
Total fixed price	Total fixed price for all activities	20%

All applicants are required to be registered and authorized to perform the scope of work in the place of performance.

PROPOSED TIMELINE:

April 15, 2024	Release of RFP
May 15, 2024	Completed proposals must be delivered electronically to Stephanie Deese sdeese@ncawdb.org by 5:00 pm EST
June 15, 2024	Final decision and notification
TBD	Virtual Discussion with Training Team

(Please note it is our best intent to comply with the above timeline, but unavoidable delays may occur)