

# Request for Proposal

---



**Issued By: Southern Workforce Board, Inc.**

3202 W. University Blvd, Durant, Oklahoma 74701

P.O. Box 744, Durant, Oklahoma 74702

**Issue Date:** April 21, 2026

**Proposal For:** Workforce Innovation and Opportunity Act – Title I

**Program Type:** Integrated Services for Adults, Dislocated Worker & Youth Services.

**Proposal Due Date:** May 15, 2026 – 12:00 PM (CDST)

Please note that there is an established deadline for receipt of proposals. The dates are shown in the Dates and Deadlines section of this proposal. Information submitted within this proposal may become a part of the contract if selected.



SWB is an Equal Opportunity Employer/Program and Activities. Auxiliary aids and services are available upon request to individuals with disabilities. SWB's employment program is 100 percent funded by the U.S. Department of Labor through awards totaling \$5,000,000.

BABEL NOTICE (29 C.F.R. § 38.9(g) (3)): This document contains vital information. If English is not your preferred language, contact One stop Operator, ososouthern@gmail.com, 1414 E. Wade Watts Ave. 74501 (580)634-1853 TTD/TTY: 711 or 800-722-0353 to obtain translation and/or interpretation services for the content of this document.

- 1. Introduction and Authority.....5**
  - Introduction.....5
  - Authority..... 5
- 2. Dates and Deadlines..... 5**
- 3. Proposal Information..... 6**
  - Statement of Work.....6
  - Solicitation Process..... 8
  - Cost and Price Analysis..... 9
- 4. The Contract That May Result From This RFP..... 9**
  - Contract Cost..... 9
  - Contract Type..... 9
  - Criminal History Reports..... 9
  - Contract Renewal and Extension..... 9
  - Program and Performance Measures..... 10
  - Adult/DLW Measures..... 10
  - Youth Measures..... 10
  - Transitioning..... 11
  - Early Termination..... 11
  - Modification..... 11
  - Assignment and Subcontracting..... 11
  - Indemnification..... 11
  - Dispute Resolution..... 11
  - Audit Rights..... 11
  - Access to Records and Records Retention..... 12
  - Copyrights and Rights to Data..... 12
  - Pre-Agreement Cost Clause..... 12
  - De-obligations..... 12
  - Price Adjustment..... 13
  - Insurance..... 13
  - EEO Requirements..... 13
  - Participant Grievances..... 13
  - Duplicate Funding..... 14
  - Participant Rights..... 14
  - Orientation..... 14
  - Disciplinary Action..... 14
  - Confidentiality Standards..... 14
  - Participant Safety..... 14
  - Compliance With Law..... 15
  - Reporting..... 15
  - Program Income..... 16
  - Property/Capital Expenditures..... 16
  - Corrective Action..... 16

Intangible Property.....	16
Recruitment of Participants.....	17
Disallowed Costs.....	17
Contract Administration.....	17
Contractor Self-Monitoring.....	17
Integrated Service Delivery.....	17
Other Contract Provisions.....	17
<b>5. Integrated Delivery of Services and Information on the One Stop System.....</b>	<b>18</b>
Locations of Workforce Centers and Current Delivery Methods.....	18
<b>6. Services to Be Procured By This Proposal.....</b>	<b>20</b>
Program Design Framework of Local Youth Programs.....	23
Referrals for Youth.....	24
Development of Provision of Certain Elements.....	24
Elements to be provided by the Service Provider.....	24
Program Element 1: Tutoring, study skills training, instruction, and dropout prevention services.....	24
Program Element 2: Alternative secondary school services or dropout recovery services.....	25
Program Element 3: Paid and unpaid work experience.....	25
Program Element 4: Occupational Skills Training.....	26
Program Element 5: Education offered concurrently with workforce preparation and training for a specific occupation.....	26
Program Element 6: Leadership Development Opportunities.....	27
Program Element 7: Supportive Services.....	27
Program Element 8: Adult Mentoring.....	27
Program Element 9: Follow-up services.....	28
Program Element 10: Comprehensive guidance and counseling.....	28
Program Element 11: Financial Literacy Education.....	29
Program Element 12: Entrepreneurial Skills Training.....	29
Program Element 13: Services that provide labor market information.....	30
Program Element 14: Postsecondary preparation and transition activities.....	30
Special Projects Proposed.....	31
National Emergency Grant/Competitive Grants.....	31
<b>7. Technical Assistance to Proposers.....</b>	<b>31</b>
<b>8. Budget Information.....</b>	<b>32</b>
<b>9. Proposal Evaluation Criteria.....</b>	<b>32</b>
<b>10. Proposal Instruction and Proposal Outline.....</b>	<b>33</b>
<b>11. Attachments.....</b>	<b>35</b>
Cover Page.....	35
Proposers Contact Information and Description of Organization.....	35
Prepare a narrative outlining how you will provide the staff required in the RFP. (Page Limit – 8).....	35
Qualifications of Staff. (Page Limit – 2).....	36
Performance and Performance Measures. (Page Limit – 2).....	36
Previous Experience. (Page Limit – 5).....	36
Budgets. (Page Limit – 2) (Budget forms not included in page limit).....	37

Present a Statement of Administrative Ability. (Page Limit – 2).....	37
<b>12. Certifications and Signature.....</b>	<b>38</b>
Certificate Regarding Equal Employment Opportunity.....	38
Certificate Regarding Contract Work Hours and Safety Standards Act (40 U.S.C. 327-333).....	38
Certificate Regarding Rights to Inventions Made Under a Contract of Agreement.....	38
Certificate Regarding Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended.....	38
Certificate Regarding Debarment and Suspension (2 CFR 215.13, 2 CFR 180, and Executive Orders 12549 and 12689).....	38
Certificate Regarding Byrd Anti-Lobbying Amendment (2 CFR 200.450 and 31 U.S.C. 1352).....	39
Certificate Regarding Audit and Access to Records.....	39
Certificate Regarding Conflict Of Interest.....	39
Certificate Regarding Compliance with Federal Laws.....	39
Certification of Intent to Participate in the One Stop Delivery System (TEGL No. 16-16).....	39
Certification of Indemnification.....	40
Certificate Regarding Cost.....	40
Certificate Regarding Transitioned Clients.....	40
Certificate Regarding RFP Content.....	40
<b>Attachment B.....</b>	<b>42</b>
Proposed Budget.....	42
Budget Information Forms.....	42
Direct Programmatic Costs: Leveraged from other Program/Resources:.....	44
<b>Attachment C.....</b>	<b>45</b>
Certification Regarding Debarment, Suspension, and Other Responsibility Matters.....	46
Certification Regarding Drug-Free Workplace Requirements.....	47
Certification Regarding Lobbying.....	48
Certificate Regarding Conflict of Interest.....	49
<b>Southern Workforce One-Stop Center’s Product Box.....</b>	<b>50</b>

# 1. Introduction and Authority

## Introduction

The Workforce Innovation and Opportunity Act (WIOA), enacted in 2014, is designed to strengthen the nation’s public workforce system by aligning workforce, education, and economic development efforts. WIOA supports job seekers in accessing employment, education, training, and support services needed to succeed in today’s labor market, while assisting employers in finding and retaining a skilled workforce.

The Southern Workforce Board, Inc. (SWB) serves as the Local Workforce Development Board and WIOA Fiscal Agent for the Southern Workforce Development Area, which includes 17 counties in southeastern Oklahoma. SWB is responsible for oversight of WIOA Title I Adult, Dislocated Worker, and Youth programs and for ensuring services are delivered in accordance with federal, state, and local workforce requirements.

The purpose of the WIOA Title I programs is to provide workforce services that improve employment outcomes, support skill and credential attainment, and promote long-term economic self-sufficiency for participants. These programs also support regional economic growth by connecting employers with a skilled and prepared workforce.

Through this Request for Proposal (RFP), SWB seeks a qualified service provider to deliver integrated workforce services aligned with WIOA requirements, including coordination with required one-stop partners and effective service delivery across the Southern Workforce Development Area.

**SWB is committed to ensuring equitable access to workforce services across its predominantly rural service area.**

## Authority

This procurement is conducted in accordance with the following authorities and requirements:

- Workforce Innovation and Opportunity Act (WIOA), Public Law 113-128
- 2 CFR Part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards)
- Oklahoma Employment Security Commission policy WSD-10-2025 (Fiscal Requirements, Procurement, and Contracting)

SWB will conduct this procurement in compliance with all applicable federal, state, and local laws, regulations, and policies governing the use of WIOA Title I funds.

# 2. Dates and Deadlines

The timeline shown below is an estimated schedule of the RFP process.

Proposal Issue Date	April 21, 2026
Mailing / E-Mailing of RFP to Proposers	April 21, 2026
Final Submission of Technical Questions	May 8, 2026
Deadline for Receipt of Completed Proposals	12:00 Noon CDST May 15, 2026
Selection of Approved Bidder (SWB Mtg)	June 24, 2026
Negotiations with Approved Bidder	June 24, 2026 through June 26, 2026

Contracts Awarded	July 1, 2026
Contract Performance Begins	July 1, 2026
Contract Performance Ends	June 30, 2027

*Note: The deadline shown above (May 15, 2026) is extremely important. The completed proposal must have been physically received on or prior to that deadline. Late proposals will not be accepted or considered under any circumstances, regardless of postmark date or method of delivery\**

The Southern Workforce Board, Inc. reserves the right to modify these dates outlined in this schedule. Any changes will be communicated to all known proposers.

***Kerry Manning, Executive Director  
Southern Workforce Board, Inc.  
3202 W. University Blvd  
Office Hours 8:00 A.M to 5:00 P.M.  
P.O. Box 744  
Durant, Oklahoma 74702***

### **3. Proposal Information**

This RFP is issued to ensure full and open competition. This procurement is conducted to maximize competition and prohibits the use of restrictive requirements that may limit participation. This proposal may make references to the Workforce Innovation and Opportunity Act (WIOA Title I) Grant Recipient and/or WIOA Fiscal Agent. For this RFP, those references are for the same entity. The WIOA Fiscal Agent is the entity designated by the Local Elected Officials, and in this workforce development area, it is the Southern Workforce Board, Inc. The proposer should note that the roles of various parties in the WIOA system are flexible and may vary across workforce development areas. Even within one workforce development area, the roles of SWB, WIOA Fiscal Agent, Committees, and other entities may vary over time, depending on changes in those roles as determined by the appropriate governing entities. These changes should not affect the contractor's ability to carry out the tasks required under the contract.

#### **Statement of Work**

This RFP is issued to procure services as a part of the local service delivery of the Workforce Innovation and Opportunity Act Title I. SWB is acting as the fiscal agent for the SWB and issues this RFP to procure services and/or products as described in this package. All individuals, companies, agencies, or other entities submitting proposals must be aware of the limitations stated in this section.

SWB reserves the right to withdraw this proposal at any time prior to the signing of a contract. The Southern Workforce Board, Inc. reserves the right to cancel or reissue this RFP in part or in its entirety.

Proposals selected for review will be evaluated and may be negotiated. SWB reserves the right to fund all, some, or none of the proposals received. The actual amount of any written contract is subject to negotiation prior to its finalization. The proposals that are most advantageous to the Workforce Development Area in terms of both quality and cost will be recommended for contract negotiations.

Proposers may be asked to provide clarifying statements or additional data prior to or during the review and negotiation process. These statements or data will be requested only to clarify items already included in the submitted proposal. The statements or data provided by the proposer will be considered to be a part of the proposal.

Proposals selected for review will be evaluated according to the criteria set forth in this proposal package. Some evaluation criteria will have minimum acceptable scores that must be met. Failure to meet the minimum scores will eliminate the proposal from further evaluation and consideration. Proposals will be evaluated by a team of evaluators. This team will consist of SWB members. The evaluation committee will make a recommendation to the full SWB Board. The SWB Board will then make the final decision on the organization(s) to which a contract will be awarded.

The evaluation team will only review proposals for programs that include the services requested in this proposal package. Proposers may include additional services as part of the proposal, but the proposal must, at a minimum, include the training or services specifically shown.

The proposals received will be made available to the public upon request. However, the proposals will be made available only after SWB has awarded to a proposer and the protest period has begun.

The Southern Workforce Board, Inc. has established a procedure to resolve any protests, disputes, claims, or grievances arising from this procurement process. A copy of this procedure will be made available to any proposer upon request. This procedure gives a proposer an opportunity to protest the award and provides for a review of the process and a determination by the individuals conducting the review. The notice of award and the notice of the protest process will be provided when proposers are notified of the outcome of their proposal. This notice will be provided to each proposer within 10 days of the date of award of a contract and may be provided via e-mail, direct contact by telephone, or by regular mail. The protest process will provide for a minimum of 30 days for a proposer to submit a protest. The notice of the protest process will provide information on the name and contact information of the individual to whom the protest must be submitted.

This RFP contains a proposal format. This must be followed. All data shown on the outline must be fully explained. The signature page must be completed, signed, and notarized, or the proposal will not be accepted for review.

Submitting the proposal will constitute a legal, binding offer for a period of not less than 90 days from the date of submission.

Proposers shall not offer or provide any gratuities, favors, or anything of monetary value to any officer, member, employee, or agent of the SWB, Local Elected Officials, Committees, or other organization for the purpose of having an influencing effect on their own proposal or any other proposal submitted hereunder.

Modifications to submitted proposals will be accepted only under these guidelines. (1) The original proposal that was submitted must be withdrawn. The proposer must provide a written request to withdraw the original proposal, and (2) A completely new proposal must then be submitted. No changes may be made to the proposal after the deadline.

Pre-contract costs and the costs of preparing this proposal are not allowable costs and cannot be included in the proposal budget nor in any resulting contract budget.

Proposers should be aware that funding for WIOA programs is always subject to availability and other conditions. Funding for future periods may change significantly if appropriations for WIOA programs change or if demographics within the State or local workforce development area change.

No employee, officer, or agent of the Fiscal Agent, SWB, Local Elected Officials, Committees, or other organization shall participate in the selection or award of a contract supported by WIOA funds if a conflict of interest or potential conflict would be involved.

Proposers shall not engage in any activity that will restrict or eliminate competition. Violation of this provision may cause a proposer's bid to be rejected.

The SWB and/or SWB Fiscal Agent reserves the right to contact any individual, agency, employer, or grantees listed in a proposal, to contact others who may have experience and/or knowledge of the bidder's relevant performance and/or qualifications, and to request additional information from any and all proposers. The SWB also reserves the right to conduct a review of records, systems, and procedures, including credit and criminal background checks, of any entity selected for funding. This may occur either before or after the award of a contract or agreement. Misrepresentation of the proposer's ability to perform as stated in the proposal may result in cancellation of any contract or agreement awarded.

The contractor will be monitored by the Fiscal Agent and/or SWB monitors, and must include an annual audit in the contract. Other monitors, auditors, or reviewers from State and/or Federal agencies may also monitor or audit the contractor and must be provided access to all records and documents associated with the performance of this contract.

The contractor selected through this RFP is expected to be familiar with WIOA Title I and Its Regulations and to apply them when developing the RFP response. The SWB and/or WIOA Fiscal Agent will, after the contract has been awarded, provide technical assistance to the contractor.

## **Solicitation Process**

The solicitation process for the RFP will follow a structured and transparent approach to ensure fair and open competition. The process begins with the development and approval of the RFP document, which includes a detailed scope of work, evaluation criteria, and submission requirements. Once finalized, the RFP will be advertised publicly through various channels, including the organization's website, to reach a broad audience of potential bidders. Interested parties will have the opportunity to submit questions for clarification during a designated question and answer period. All responses will be provided in writing and shared with all prospective bidders to ensure consistency and fairness. Proposals must be submitted by the specified deadline and in the format outlined in the RFP. Upon receipt, proposals will be logged, reviewed for compliance with submission requirements, and evaluated according to the established criteria by a selection committee. The committee will score and rank the proposals, and the top-ranked bidders may be invited for presentations or interviews. Following the evaluation, a recommendation will be made for the award, subject to final approval by the appropriate authority. All bidders will be notified of the outcome, and the selected bidder will enter into contract negotiations to finalize the terms of the agreement.

## **Cost and Price Analysis**

SWB has conducted and will continue to conduct cost and/or price analysis in accordance with applicable federal regulations, including 2 CFR 200.324, and Oklahoma Employment Security Commission requirements to ensure that all proposed costs are reasonable, allowable, and allocable to the performance of the contract.

SWB reserves the right to request additional cost documentation, clarification, or justification from proposers as necessary to support the cost and/or price analysis.

## **4. The Contract That May Result From This RFP**

The following are examples of the contract provisions that will be included in the contract that will be developed as a result of this RFP. The exact text of the contract provision may differ slightly from the example shown.

### **Contract Cost**

All costs that are approved in a contract must be reasonable and necessary to carry out the planned functions. The costs must be allowable and allocable to the proper grants and cost categories. If the contractor is a public entity or a non-profit entity, the contract will not include a provision for profit. Profit margins with for-profit organizations will be negotiated prior to the start date of the contract. Profit margins must be reasonable and cannot be based on a percentage of actual costs.

### **Contract Type**

The successful proposer may be offered a cost-reimbursement or performance-based contract, depending on the type of entity awarded the contract. The successful proposer(s) will be a sub-recipient of the Southern Workforce Board, Inc. The sub-recipient chosen will be reimbursed for costs on a monthly basis. The contract may have a provision for advances of funds to the contractor, with a settlement of funds advanced and actual expenditures at the end of the contract or first funding period. The contract may contain a provision for profit if the entity selected is a for-profit organization.

### **Criminal History Reports**

The contract that results from this RFP may contain a requirement that the contractor provide a current (within the past 12 months) and satisfactory OSBI criminal history report on all individuals working in any manner for the contractor if the individual will be providing services to workforce customers. The criminal history report shall be deemed to be satisfactory if it contains no history of criminal offences which would be considered crimes which present a danger to customers. These reports, if required, must be submitted to the WIOA Fiscal Agent not less than 10 days prior to the scheduled beginning date of performance under the contract. If the reports are not submitted by that deadline, the contract will be declared to be void and no payments will be made to the contractor. The cost of the criminal history reports will be paid by the contractor and cannot be included in the contract costs.

### **Contract Renewal and Extension**

The contract that results from this RFP may have a provision for extension. The terms and lengths of any extension will be established by the SWB and will be included in the contract provisions. All extensions must be documented in a modification to the contract. Each extension must be for not more than one year and a maximum of two extensions is permitted. Extensions will be contingent upon the contractors' documented and verified established performance. The below performance level values may vary based upon the SWB's Negotiated Performance Outcomes with the Oklahoma Employment Security Commission (OESC).

The Service Provider will provide monthly reports listing adult and dislocated workers receiving training services, along with their completion dates, employment, and supporting documentation for validation. (Documented through the State data system.) Board staff may verify a random sample of performance documentation submitted.

The determination of whether the Contractor has met or exceeded the required performance measures for contract extension will be based on performance outcomes through the quarter ending March 31, 2027. These results will be presented at the SWB meeting, or a Special Called SWB Executive Committee meeting, for consideration.

To be considered for contract extension, the Contractor must meet all required performance measures. In addition, the Contractor must submit a satisfactory budget for the extension period. The budget for the extension will be subject to negotiation.

### **Program and Performance Measures**

The contract that results from this RFP will have certain requirements for performance. The contract may require that the contractor submit reports of expenditures, clients served, goals versus actual performance reports, WIOA performance reports, audits, reviews made by other entities, or other information that is necessary for the SWB to evaluate the performance of the contractor. The contract may have provisions requiring minimum performance levels to be achieved before funding for remaining periods is available. The contract may have a provision to reduce or eliminate funding for future periods if that minimum performance level is not attained. It is also possible to eliminate specific service areas from the contract should the contractor fail to meet minimum performance standards in each of the areas.

### **Adult/DLW Measures**

Enrolled  
Receiving a certificate, credential, high school equivalent  
Employment First Quarter after Training Completion  
Employed 2nd Quarter after Training Completion  
Dollars Spent on Direct Customer Cost  
Clients Entering OJT and/or Registered Apprenticeship  
Received a Measurable Skill Gain

### **Youth Measures**

Enrolled  
Obtaining a HS Diploma or Equivalent  
Enrollees that are Offenders, Foster Youth or Transitioning Foster Youth, or Drop Out  
Achieve a Measurable Skill Gain  
Placement in Education or Employment 2nd Quarter after exit  
Attainment of Degree or Certificate after training completion  
On the Job Training and/or Apprenticeship  
Youth Completing Individual Service Plan Goals (Work Readiness Included)

*\*SWB reserves the right to modify and/or clarify the measures during negotiations.*

## **Transitioning**

The contractor will be required to continue to provide services to customers that are transitioned from the previous contractor that is providing the services included in this proposal. The new contractor must assure that the original plan of services for the customer will be followed with no interruptions in service to the customer. Costs for these “transitioned” or “inherited” customers must be factored into the costs that are included in the budgets for this proposal.

## **Early Termination**

The contract resulting from this RFP will include provisions for termination for failure to satisfactorily perform the required tasks. The contract that results from this RFP may also have provisions that allow the contract parties to cancel the contract at any time by providing advance notice to other contract parties. The contract will also provide for termination of the contract for lack of funds.

## **Modification**

The contract will have a provision for modifying the contract. Modifications may be necessary to incorporate changes required by Federal or State laws and policies. Modifications may be necessary to increase or decrease funds to the Contractor if funds become available through National Emergency Grants, Trade Adjustment Assistance, or other sources. Additional modifications may be necessary to increase or decrease funds when circumstances that were not known or foreseeable at the time of procurement and which require re-negotiation of the contract and/or additional areas or counties join together, requiring a larger service area.

## **Assignment and Subcontracting**

A part of the proposal evaluation is based upon the previous experience of the proposer and its staff. The contract will contain a provision that prohibits subcontracting or assigning the work to be performed without the written permission of the SWB.

## **Indemnification**

The contract will include an indemnification clause. The indemnification clause will state that the proposer (contractor) shall indemnify and hold harmless the State of Oklahoma, the U. S. Department of Labor, the Southern Workforce Board, the Southern Workforce Board officers, agents, and employees and the WIOA Local Elected Officials from liability of any nature and kind, including costs, expenses, and attorney fees, for or on account of any actions, claims, suits, and damages of any character whatsoever arising out of any negligent act or omission of the proposer (contractor) or any of its employees, agents, volunteers, subcontractors, or representatives.

## **Dispute Resolution**

The contract will have a provision for dispute resolution. This provision will require the Contractor to use administrative processes and negotiation in attempting to resolve disputes arising from this contract. The contract will require the contractor to continue to provide services while the dispute process is ongoing.

## **Audit Rights**

The contract will have a provision which will allow the Fiscal Agent, the state of Oklahoma, the U. S. Department of Labor, the Comptroller General of the United States, any of their duly authorized representatives, or others with statutory audit rights to perform audits after reasonable advance notice to the

Contractor at any time during the contract period or within five (5) years from the date of final payment of this contract. At any time during normal business hours and as often as Fiscal Agent or any of the above parties may deem necessary, the Contractor shall make available to their duly authorized representatives for examination, all its records with respect to all matters covered by this contract. The Fiscal Agent, the State of Oklahoma, the U. S. Department of Labor, the Comptroller General of the United States, or any of their duly authorized representatives shall have authority to audit, examine, and make excerpts or transcripts from, any books, documents, papers, and records of the Contractor which are directly pertinent to this Contract, including all contracts, invoices, materials, payrolls, personnel records, conditions of employment, and other data relating to all matters covered by this contract as required by parts of the OMB Uniform Guidance 200.501-200.521.

### **Access to Records and Records Retention**

The contract will have a provision relating to Records Retention. That provision will require the Contractor to maintain all records pertinent to this contract, including financial, statistical, property, participant records, and supporting documentation. These records shall be preserved and made available to the Fiscal Agent and its agents for a period of five (5) years after the date of final closeout of this contract. However, in the event of an audit, records shall be kept by the Contractor for 3 years past any audit or monitoring resolution even if the period is longer than 5 years. If the Contractor is unable to retain the necessary participant and financial records for the required period, the Contractor shall transfer such records to Fiscal Agent. Such records shall be transmitted to Fiscal Agent for acceptance in an orderly fashion with documents properly labeled and filed, and in an acceptable condition for storage. The contract will be subject to provide access to records as required by the OMB Uniform Guidance parts 200.336-200.337, and 200.201 as applicable.

### **Copyrights and Rights to Data**

The contract will have a provision relating to Copyrights and Data. That provision requires the Contractor to agree that the Oklahoma Employment Security Commission, the State of Oklahoma, and the U. S. Department of Labor shall have unlimited rights to any data first produced or delivered under the contract.

### **Pre-Agreement Cost Clause**

The contract will have a provision relating to Pre-Agreement Costs. That provision will state that in the event any signatures on the contract are made subsequent to the beginning date of the contract, allowable expenditures of funds between the beginning date of this contract and the actual signature date of the contract will be allowed for no more than 30 calendar days prior to the actual signature dates of the contract.

### **De-obligations**

The contract that results from this RFP will contain clauses regarding availability of funds. Those clauses will allow the Fiscal Agent to decrease or eliminate funding to the contractor if funding made available to the Southern Workforce Development Area is not sufficient to allow for full payment of the contract.

At the time the contract is written, the actual funding amounts provided to the Southern Workforce Development Area for Program Year 2026 for Adult, Dislocated Worker and Youth may not be available. It is likely that the only known funding will be Youth for the period of July 1, 2026 through June 30, 2027. If additional funds are received for the period beginning July 1, 2026 this contract may be modified subsequent to the beginning of the contract period to reflect changes that are necessary due to actual funding amounts received. Any budget amounts remaining from budgets at the end of the year may not be carried over and

expended in the extended period if the contract is extended after the original period. The carryover of any funds is an item that must be negotiated with the SWB and/or the Fiscal Agent for the workforce development area.

### **Price Adjustment**

The contract will have a provision relating to Price Adjustment. That provision will state that if the contract was negotiated in reliance upon cost data supplied by the Contractor; the Fiscal Agent, with approval from SWB, can adjust the price to exclude any significant sum by which the price was increased because the Contractor had submitted cost data in the original proposal which was not accurate, complete, or current.

### **Insurance**

The contract that results from this RFP will have certain requirements for insurance. There is no requirement that proof of insurance be submitted with the proposal, but evidence of insurance must be provided upon request. The SWB has a policy regarding insurance that is required of it and contractors. Those requirements will be included in the contract. Those requirements may include general liability coverage, fire/theft insurance on property, insurance for motor vehicles used by employees of the contractor, workers compensation, and blanket bond coverage.

### **EEO Requirements**

The contract will have provisions requiring the proposer to comply with no discrimination and equal opportunity (EO) provision of Section 188 of the WIOA and 29 CFR 667.275 and CFR Part 37 certain. No person in the United States shall be, on the grounds of race, color, religion, sex, national origin, age, disability, political affiliation, belief, or marital status be excluded from participation in, be denied the benefits of, be subject to discrimination under, or be denied employment in the administration or in connection with any program or activity funded in whole or in part with funds made available under this agreement.

The Contractor shall take Affirmative Action to ensure that qualified applicants from groups which have historically been denied equal opportunity for employment because of the above factors shall be provided access to and encouraged to participate in employment and training activities.

The Contractor agrees to develop and implement an Affirmative Action Plan or MOA (Methods of Administration) as a formal assurance and guide for compliance with EEO requirements.

### **Participant Grievances**

The contract will include a provision that requires the Contractor to adopt procedures for hearing and resolving grievances and complaints arising out of this contract, in conformity with SWB's established policies.

The Contractor agrees that any customer grievances initiated as a result of this contract and left unsettled by Contractor's grievance procedures shall be received and resolved in accordance with SWB's Grievance Procedure. The Contractor shall abide by Final Determinations issued under SWB's grievance procedures.

The Contractor agrees to inform all subcontractors, including OJT employers, of the availability of the Contractor's grievance procedures, for use by the subcontractor in the event the subcontractor has no grievance procedures of its own.

## **Duplicate Funding**

The contract will include a provision requiring the Contractor to agree that any Contractor's costs already allocated to other sources may not be included in the contract cost. The Contractor must inform the SWB and/or the Fiscal Agent if the Contractor applies for or receives funds that affect the cost or performance of work under this contract, and how the Contractor plans to allocate duplicated funds. The SWB must have the right to renegotiate the contract in light of the changed costs. This provision will notify the Contractor that Oklahoma Employment Security Commission federal funds can be used only to supplement training resources available through Education Assistance Programs. OESC federal funds may be used in conjunction with PELL, SEOG, and other programs, but funds from different sources must be used to pay for different services and/or braided with no duplication.

## **Participant Rights**

The contract will have a provision concerning participant rights. That provision will state that at a minimum:

### *Employment Terms, Benefits, and Working Conditions:*

All individuals employed in subsidized jobs shall be provided benefits and working conditions at the same level and to the same extent as other employees working a similar length of time and doing the same type of work, except that no funds available under this contract may be used for contributions on behalf of any trainee to retirement systems or plans.

## **Orientation**

All participants enrolled under this contract shall be oriented by Contractor or its agent concerning integrated services, project goals, and training conditions, including: (1) attendance and punctuality standards; (2) training and other services which will be made available; (3) other project expectations. This orientation shall take place during the participant's first visit to a workforce center and will be done by the center staff.

## **Disciplinary Action**

Contractor shall notify the appropriate SWB office as far in advance as possible of services, work, or training-related problems involving Southern Workforce Development Area participants. The Service Provider shall be offered every reasonable opportunity to work with the site supervisor and the participant to resolve the problem. When participant suspension or termination appears to be necessary, the site supervisor shall give the SWB and the Fiscal Agent office advance notice by telephone. In extreme cases, the site may immediately suspend a participant for dangerous or outrageous behavior, but in no case shall the participant be terminated without advance notice by telephone to the appropriate SWB and Fiscal Agent office.

## **Confidentiality Standards**

If disclosure of trainee records is requested by the public, current State of Oklahoma confidentiality standards and Title 5, USC 552, commonly known as "The Privacy Act", pertaining to records of participants in Fiscal Agent programs, shall apply.

## **Participant Safety**

The contract will require that conditions of employment and training shall be appropriate and reasonable in light of such factors as the type of work, geographical region, and proficiency of the trainee.

Participant trainees enrolled under the contract shall be adequately supervised during training hours and be provided with safe training conditions that, at a minimum, shall conform to the health and safety regulations established by the State of Oklahoma.

## **Compliance With Law**

The contract will have a provision requiring the Contractor to maintain compliance as follows:

In rendering the performance hereunder, Contractor shall comply with the requirements of the Workforce Innovation and Opportunity Act (WIOA) Public Law 113-128, with the regulations promulgated hereunder, and with the following:

- Applicable Federal Laws, Regulations, and OMB Uniform Guidance
- State and Local Laws
- WIOA Policies as adopted by the Oklahoma Employment Security Commission
- The Southern Workforce Board's Local WIOA Plan
- SWB Policies and Procedures
- U. S. Department of Labor Statement 29 CFR 37.20 Regarding the Non-Discrimination
- Equal Opportunity Provisions of the Workforce Innovation and Opportunity Act of 2014
- Opportunity Act of 2014. Section 188 of the WIOA and 29 CFR Part 38.

In the event of a conflict between such laws and regulations and the terms of this agreement, precedence shall be given to the laws and regulations

## **Reporting**

In addition to the completion of Attachment A (Projected Performance).

The Contractor agrees to provide certain reports to the Board and/or Fiscal Agent relating to the expenditures or performance of work under this contract. The Contractor specifically agrees to provide a monthly determination of expenditures classified so that the Fiscal Agent can readily and accurately determine cost categories. The Contractor agrees to provide reports to the Workforce Board, Future Workforce Committee, and/or Local Elected Officials regarding such items as the contract expenditures, expenditures compared to the budget, current progress toward meeting performance measures, audit reports, monitoring reports, participant counts, and other reports that are determined to be necessary.

- Items that may be required to be reported to SWB on a monthly basis are:
- Number of Participants beginning education/training activities.
- Number of Participants completing education/training activities.
- Number of Participants completing education/training activities that received a credential.
- Identify the types and number of credentials earned by type.
- Number of Participants who completed education/training and entered unsubsidized employment.
- Number of Participants who entered unsubsidized employment after training and are employed in the first and second quarters following the initial placement.

Number of Participants by county and expenditures

All contractors must submit a cumulative report for the period July 1, 2026, through June 30, 2027, herein referred to as a final report, that sets forth the amount of funds received and paid for services under the contract. The final report must also set forth the number of participants who received services, the types of

services provided, and the costs of those services. The final report must also set out the final disposition of applicants, whether in job placement or in further training. The monthly and final reports shall also set out the amounts spent on contract administration and on the provision of services to participants.

The contract resulting from this RFP may include additional requirements that the contractor make regular presentations to the SWB, Local Elected Officials, or other similar groups. These reports may include information on customers, identified customer needs, services provided to customers, employer needs, progress made in meeting real-time performance metrics, and similar information.

The Contractor will also be required to provide to the SWB and/or the Fiscal Agent any narrative, statistical, and financial reports related to the elements of the contract in the forms and at such times as required by the SWB.

### **Program Income**

The contract will include a provision regarding Program Income. That provision will state that if the Contractor receives any program income from activities funded under this contract, the income must be properly accounted for and cannot be spent without prior SWB approval. Program income must be accounted for according to the requirements of the applicable OMB Uniformed Guidance policies of the OESC, State of Oklahoma, and/or the WIOA and Regulations.

### **Property/Capital Expenditures**

The contract will have a provision relating to Property/Capital Expenditures. That provision will state that the Contractor shall follow their normal procedures in purchasing, renting, or leasing any property described in the Project Budget. Procurement procedures must be in compliance with the policies of the State of Oklahoma for WIOA as outlined in the policy guidance provided by the State. The provision will stipulate that the property must be handled in accordance with the State of Oklahoma's Property policies. No Property/Capital expenditures will be allowed without prior approval of SWB.

### **Corrective Action**

The contract will have provisions describing processes relating to corrective actions. This provision will describe notices to the Contractor, corrective action steps and plans, timeframes, and related provisions.

The contract that results from this RFP will have certain requirements for performance. The contract may require that the contractor submit reports of expenditures, customers served, goals versus actual performance reports, WIOA performance reports, audits, reviews made by other entities, or other information that is necessary for the SWB to evaluate the performance of the contractor. The contract will have provisions requiring minimum performance levels to be achieved before funding for the remaining periods is available. The contract may have a provision to reduce or eliminate funding for future periods if that minimum performance level is not attained.

### **Intangible Property**

The contract will have a provision relating to Intangible Property as addressed in OMB Uniform Guidance part 200.315. That provision will state that if products are produced under this contract to which a patent is granted, the patent rights shall belong to the SWB, the State of Oklahoma, or the U. S. Department of Labor.

This provision shall not apply to products produced by the Contractor other than those produced under this contract and which are used in the performance of the work required by this contract.

### **Recruitment of Participants**

The contract will have a provision concerning the recruitment of participants. The Contractor will be responsible for recruitment of participants in sufficient numbers and types so that a sufficient level of local WIOA expenditures can be maintained. The contract will explain that if a sufficient number of participants are not recruited and enrolled, the contract funding levels may be negotiated to adjust staffing levels funded through the contract.

### **Disallowed Costs**

The contract that results from this RFP will have certain provisions regarding disallowed costs and audit/monitoring findings. The contract will have provisions that require the contractor to repay any expenditure that is found to be unallowable. The contract will have provisions requiring the contractor to remedy any deficiencies found in audits or monitoring reports prior to additional expenditures or additional receipts of funds.

### **Contract Administration**

The contract that results from this RFP will have certain requirements for contract administration. The contractor will be required to comply with appropriate OMB Uniformed Guidance, State of Oklahoma policy guidance, and applicable local policy guidance from the SWB and/or the Fiscal Agent. The proposer must have the technical competence and expertise in management and administration to properly administer the contract.

### **Contractor Self-Monitoring**

The contract that results from this RFP will have certain requirements for self-monitoring. The contractor(s) will be required to periodically conduct this self-monitoring to ensure compliance with WIOA and local policies, budgets, performance measures, and similar measures. The SWB may require the contractor to submit periodic reports on its self-monitoring efforts.

### **Integrated Service Delivery**

The contract will have provisions regarding the provision of integrated services and/or services being delivered in a functional delivery system. This may require the contractor to provide some services that are traditionally delivered by other entities that are nonetheless allowable services. In the integrated delivery system, other entities may also be required to deliver some of the services that are included in the statement of work of this contract. The contract will include a requirement that staff provided by the service provider will be functionally supervised by the One Stop Operator and may be supervised by staff of other entities that are assisting in the provision of services in the workforce system or that the contractor's staff supervise staff of other entities working in the workforce centers.

### **Other Contract Provisions**

The contract may include provisions not described in this RFP. Those provisions may be necessary due to changes in applicable laws or regulations, provisions added or changed to reflect negotiations made subsequent to the issuance of this RFP, requirements not known at the time of the issuance of this RFP, or other reasons.

## 5. Integrated Delivery of Services and Information on the One Stop System

SWB has selected the following locations for Oklahoma Works Centers within its seventeen (17)- county workforce development area. The SWB is also looking at ways to improve the quality and quantity of services available to customers through centers and reserves the right to move the contractor's staff to other locations or centers as identified by SWB.

The chart below shows the current positions filled at the workforce centers. The contractor selected through this RFP will be expected to provide Title I services at each of these centers; however, it may propose alternative staffing models/levels.

### Locations of Workforce Centers and Current Delivery Methods

Center Location	Delivery System	Current Staffing Provided by WIOA Title I Program Funds
Ada	Comprehensive Center delivering integrated services with other One-Stop Partners and provide Youth Services	1.00 provided in the delivery of WIOA Title I services.
Antlers	Career services and Youth services by appointment	Utilize staff from Hugo location
Ardmore	Comprehensive Center delivering integrated services with other One-Stop Partners. Provide Youth Services	1.00 provided to assist in the delivery of WIOA Title I
Atoka	Satellite Center offering career services & Youth Services.	1.00 to deliver WIOA Title I services
Hugo	Satellite Center offering career services & Youth Services.	2.00 provided in the delivery of WIOA Title I services.
Pauls Valley	Satellite Center offering career services & Youth Services.	Utilizes staff from the Ardmore location
McAlester	Comprehensive Center delivering integrated services with other One-Stop Partners. Provide Youth Services	2.00 provided in the delivery of WIOA Title I services.
Durant	Comprehensive Center delivering integrated services with other One-Stop Partners. Provide Youth Services	1.00 provided in the delivery of WIOA Title I services.
Idabel	Comprehensive Center delivering integrated services with other One-Stop Partners. Provide Youth Services	2.00 provided in the delivery of WIOA Title I services.
Tishomingo	Career services and Youth services 2 days per week as identified	Utilize staff from the Atoka office.

Poteau	Comprehensive Center delivering integrated services with other One-Stop Partners. Provide Youth Services	2.00 provided in the delivery of WIOA Title I services.
Wilburton	Satellite Center offering career services and Provide Youth Services	Utilizes staff from the Poteau location
Stigler	Satellite Center offering career services and Provide Youth Services by appointment	Utilize staff from Wilburton office.
Talihina	Satellite Center offering career services and Provide Youth Services by appointment	Utilize staff from Wilburton office.

**\*The chart above shows that the WIOA Title I program centers and current staffing within the seventeen-county region and may be subject to change.**

The SWB has competitively selected a One-Stop Operator through a separate RFP who will provide functional management, compliance, and oversight of the Oklahoma Works Centers and will be responsible for coordinating all system partners' services throughout the region. In addition, center managers will be selected in each of the centers. The center manager will determine where staff are assigned. It is also possible that some of the WIOA Title I-funded staff may assume the role of a center manager.

The staff assigned to the workforce centers may, on a temporary or permanent basis, be assigned to other positions within the centers. In some instances, staff working in a functional unit may be supervised by staff who are employed by an entity other than the contractor. However, for matters such as payroll, personnel, travel, disciplinary actions, etc., staff provided by the contractor will be responsible to their employer, the contractor.

Proposers should note that they are not required to provide rent, utilities, telephone service, telephones, internet service, supplies used by workforce customers, lawn and grounds maintenance, equipment purchases, equipment maintenance, equipment software, and assessment supplies for One Stop Center and Satellite offices. All of these items will be provided by the Fiscal Agent for the workforce area.

SWB has developed a "Product Box" that is a listing of services and training which may be available to workforce system customers. The "Product Box" will contain services that promote Talent Improvement, Earn the Best Job Possible Skills and Occupational Skills. Talent improvement may include items such as life management skills, literacy and adult basic education, ESL, computer skills, foundation training, etc. Earning the best Job Possible may include skills centered on job readiness, job-seeking, and job-getting. Occupational Skills may include paid work experience, OJT, skill-based internships, customized training, and earning a degree or credential.

In the course of providing services to workforce customers, contractor staff may refer customers for some of those Products; staff may provide some of the Products as part of their work at the Centers; or staff may request that the specific Product be made available after procurement by the Fiscal Agent. The contractor will be required to pay the costs of staff wages and related costs for FICA, FUTA, SUTA, and workers' compensation insurance. The contractor is responsible for paying all Direct Client Costs relating to all participants during the contract period.

## 6. Services to Be Procured By This Proposal

The contractor will provide the staff to deliver Title I services throughout the SWB's 17-county region. This staff will assist One Stop Partners in providing services at the workforce centers within the workforce development area. This staff will provide services in accordance with the Operational Policies and Procedures and the SWB Strategic Plan. The contractor will be working with SWB to develop new services for jobseeker customers to be included in the Product Box.

The Contractor selected to provide integrated services to the Adult and Dislocated Workers will provide staff to work with a variety of partners to deliver services in Oklahoma Works Centers. The staff may be required to serve in a variety of functions inside the workforce centers. However, most of the work can be distinguished into three categories: Basic career services, Individual career services, and training services for adult and dislocated workers, as well as the 14 Youth elements. Currently, the model used in the Southern Workforce Development Area is very linear, and participants are moved through the service delivery process accordingly.

Career services for Adult and DLW customers start at the front door. They are available to any person who wants or needs these services. They may be provided electronically or by staff. Career services are designed to help residents get a job, keep a job, or get a better job. Career services are the following:

- Eligibility for Services
- Outreach, intake, orientation
- Initial assessment
- Labor exchange services
- Referrals to programs
- Labor market information
- Performance and cost information
- Supportive services information
- Information on UI
- Financial aid information
- Job Openings/Listings
- Placement Services
- Employment and Career Information
- Computer Access
- Job Search Assistance

Recruiting customers or conducting outreach to inform potential customers about the benefits of working with Oklahoma Works is another career service. Often, there are special efforts to provide recruitment to aid businesses looking for new employees. It is also crucial that we attract youth who are about to graduate from high school and are beginning to make career decisions. Keeping recent college graduates in the area is another key for Southern Oklahoma's ability to grow, and staff will be required to ensure contacts with local career techs, colleges, and universities are cultivated to aid in this process.

The contractor will be responsible for assuring quality career services are delivered to all customers. Managers may do this by closely supervising the service delivery process and directly serving customers. Since each customer may choose from an array of services to help meet his/her individual employment goals, each step of the service process must build on the step before it with some value added. It is the responsibility of the Oklahoma Works staff to ensure the customer is always aware of their next step in the process. All staff must be competent and able to provide career services.

The next level of service is Individualized Career Services. These services require more staff assistance than those typically found in basic career services. Customers who progress to this level of service are often in need of specific “skills” in order to help them find suitable employment. In this category, you will find customers who haven’t been able to find a job while receiving only basic career services. In order to receive and benefit from Individualized services, it is necessary that a comprehensive assessment be completed. This assessment provides each customer with a detailed career compatibility report that will aid both them and staff as they complete an Individual Employment Plan for their participants.

Individualized Career Services are meant to be individualized for each participant. While a variety of these services will benefit most customers at a workforce center, each customer must have their particular career path to a better job charted to fit their circumstances. Individualized Career Services include but are not limited to the following:

- Comprehensive Assessment
- Individual Employment Plan
- Career planning, counseling
- Short-term prevocational services
- Internships and Work Experience
- Workforce Preparation activities
- Financial literacy
- Out of area job search
- English language acquisition
- GED Preparation
- Referrals to Suitable Partner Services
- Supportive Services
- Interview Skills Workshop
- Resume Writing Workshop
- Individual Job Development
- Basic Computer Skills
- Remediation of Literacy or Numeracy Skills
- Adult Basic Education

Customers who use these services should find their way to improved employment prospects. The necessary staff time to work with customers who take advantage of individualized career services increases dramatically compared with those who receive only basic career services. They may also need to work in a fashion, according to their Individual Employment Plan, that requires them to take the necessary steps to move from one service to the next. It will not always be possible for a customer to benefit from several of these services in a short time frame. As staff counsel with customers, they identify other service needs that are not available and have to be referred to a partner agency for services before they can take advantage of what we offer. Still, there may be customers who need the next level of services – Training Services.

Training services are offered to those participants who need additional occupational training to find employment that will provide for them and their families. Candidates for training must show that they are interested in entering a career that is on the SWB’s list of demand occupations, able to benefit and finish the necessary training in order to go to work in that occupation and must fall within the SWB’s Priority of Service Policy, which is impacted by the number of training dollars available. When it is determined that we have a

customer who needs to receive training and in an occupation that is on SWB's demand occupation list, then staff must work with that customer to determine the most appropriate training institution that has the specific occupation on the approved training provider list. Staff will work with the customer and the institution to ensure that all enrollment requirements are completed on time and that the customer has a very short waiting period. Staff will have already made certain through the assessment process that the customer is able to complete the course. Staff will also ensure that the customer possesses the same attributes shown by people who are successful in this chosen occupation.

After the customer has started training, it is imperative that staff maintain contact with them to provide counseling and encouragement. The staff's job is to ensure that, if any barriers to successful completion of the training arise, they are in a position to work with the customer to overcome them. Successful completion and employment in that occupation is the outcome we are looking for. Most of the training services staff will engage in are traditional occupational training at an educational institution. However, that is not the only training service that is available to customers.

The SWB offers On-the-Job-Training (OJT). Staff will need to be familiar with this training as well. This is where a customer lacks certain experience that a company normally demands of its new employees, but is willing to take on a participant with the aid of an OJT to cover the cost of extraordinary training. The SWB may establish a percentage that stipulates that, at a minimum, this amount must be spent on customers participating in OJT. The benefits of this approach are that a customer is hired in order to start the training period, and two goals have been accomplished: an individual who gets training and enters employment. Staff will be required to work directly with businesses to facilitate this type of training.

The Contractor who will be providing integrated services to Adults, Dislocated Workers, and Youth Services must hire staff who understand that they are providing a service system. The Contractor should ensure that all staff are trained to be experts at providing the full array of services available in the workforce centers. One in which quality customer service is required at all times. They will support them in work and they will help them find better jobs. Staff will listen to each customer to understand their needs and will make every effort to provide them with the tools to become more successful. This means that staff will help each customer to identify the best mix of services to meet their needs.

The Workforce Innovation and Opportunity Act stipulates that a minimum of 75% of youth program funds be expended for services to Out of School Youth. In delivering services to youth, the service provider must recruit, determine eligibility for, and enroll sufficient out-of-school youth to ensure the workforce development area meets this requirement. The service provider will meet the mandated goal of 75% of all youth expenditures being expended on Out of School Youth. In addition, 20% of total youth program dollars must be spent on Work Experience, as determined by allotted funds.

Youth services in this workforce development area are provided by several different organizations. The list below shows services and elements that are to be provided by the Service Provider. Those services that are to be provided by other organizations will be designated or selected during a procurement process.

The service provider will deliver the Adult, DLW, and Youth Program Design Framework Services. This service provider will also provide portions of certain program elements, such as work-based learning, apprenticeships, internships, and job shadowing. For those specific elements, the service provider will identify and qualify the

worksites to be used, but the actual work experience, internship, and job shadowing will be conducted at the worksites of other public and private entities.

Additionally, the Service Provider may provide all or part of other elements, provided there is no cost associated with providing the element. For example, if software were available, the Service Provider's staff could provide study skills training at the Service Provider's offices.

Other contractors, vendors, community organizations, public and private worksites, etc., will be used to provide the program elements. (Element Providers) Those providers will be chosen through separate procurement or referral processes. The Service Provider will make referrals for the elements listed under "Delivered by Other Contractors, Vendors, and Community Organizations".

Services provided by the Contractor must be provided only to youth who have been determined to meet the eligibility criteria for WIOA Title I. Intake, eligibility determination, development of an individual service strategy, and tracking will be performed using the State-mandated system, which is a participant management information system that is provided via the internet to all workforce offices in Oklahoma. Contractor(s) selected through this RFP will provide the following:

### **Program Design Framework of Local Youth Programs**

The program design framework of local youth programs must include:

1. All of the provisions contained in the SWB Youth Policy that direct the scope and design of the youth program activities in the Southern Workforce Development area, as well as other policies issued by SWB.
2. Intake activities may involve services such as registration, eligibility determination, and collection of information to support verification of eligibility for services. It may also include pre-screening potential participants and general orientation to self-help services. Other activities include referrals to other services, which may include providers of the ten program elements.
3. An objective assessment must meet the requirements of WIOA Title I and is a process that identifies service needs, academic levels, goals, interests, skill levels, abilities, aptitudes, and supportive service needs, and measures barriers and strengths. It includes a review of basic and occupational skills, prior work experience, employability potential, and developmental needs. The result of an assessment is an individual service strategy.
4. The development of an individual service strategy for each youth participant that meets the requirements of WIOA Title I, including identifying a career goal and consideration of the assessment results for each youth participant. This individual service strategy must also meet all requirements set by State policy.
5. Preparation for postsecondary educational opportunities; provide linkages between academic and occupational learning; provide preparation for employment; and provide effective connections to intermediary organizations that provide strong links to the job market and employers.

## Referrals for Youth

The Contractor must ensure that the referral requirements in WIOA Title I for youth who meet the income eligibility criteria are met, including:

1. Providing these youth with information regarding the full array of applicable or appropriate services available through the Local Board, providers found eligible by the board, or One-Stop partners; and
2. Referring these youth to appropriate training and educational programs that have the capacity to serve them either on a sequential or concurrent basis. The Contractor(s) must ensure that the referral requirements in WIOA Title I for youth who do not meet the enrollment requirements of a particular program or who cannot be served by the program are met, including:
3. Referral for further assessment, as necessary, and
4. Referral to appropriate training or educational programs that have the capacity to serve them either on a sequential or concurrent basis.

## Development of Provision of Certain Elements

Youth programs must ensure that certain services (elements) are available to youth participants. Some of these elements will be provided or partially provided by the Contractor(s). Others may be provided by other organizations designated or selected in a competitive process.

## Elements to be provided by the Service Provider

In alignment with SWB Youth Policy, Oklahoma Employment Security Commission WSD #12-2024, and WSTA-05-2025 the following Youth Elements are to be provided

### *Program Element 1: Tutoring, study skills training, instruction, and dropout prevention services*

Element One includes “tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential.

Secondary school dropout prevention strategies include services and activities that keep a young person in school and engaged in a formal learning and/or training setting. This program's focus is on in-school services relating to the attainment of a high school diploma.

The element includes:

- tutoring, study skills training, and instruction that lead to a high school diploma;
- secondary school dropout prevention services intended to lead to a high school diploma.

However, this element does not include:

- dropout recovery strategies that lead to completion of high school equivalency. Those are included in program element 2;
- training services leading to a postsecondary credential. Those are included in program element 4.

### *Program Element 2: Alternative secondary school services or dropout recovery services*

Element two includes alternative secondary school services such as basic education skills training, individualized academic instruction, and English as a Second Language training, or those services that assist youth who have struggled in traditional secondary education. Dropout recovery services, such as credit recovery, counseling, and educational plan development, assist youth who have dropped out of school. While the activities within both types of services may overlap, each is provided with the goal of helping youth to re-engage and persist in education that leads to the completion of a recognized high school diploma equivalency.

### *Program Element 3: Paid and unpaid work experience*

Element Three is a planned, structured learning experience that takes place in a workplace for a limited period of time. Work experience may be paid or unpaid, as appropriate. A work experience may take place in the private for-profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience where an employee/employer relationship, as defined by the Fair Labor Standards Act and State law. Funds provided for work experiences may not be used to directly or indirectly aid in the filling of a job opening that is vacant because the former occupant is on strike, or is being locked out in the course of a labor dispute, or the filling of which is otherwise an issue in a labor dispute involving a work stoppage. Work experiences provide the youth participant with opportunities for career exploration and skill development.

TEGL No. 8-15 provides further discussion of allowable expenditures that may be counted toward the work experience expenditure requirement and states that program expenditures for the work experience program element may include more than just wages paid to youth in work experience. Allowable work experience expenditures include the following:

- Wages/stipends paid for participation in a work experience;
- Staff time working to identify and develop a work experience opportunity, including staff time spent working with employers to identify and develop the work experience;
- Staff time working with employers to ensure a successful work experience, including staff time spent managing the work experience;
- Staff time spent evaluating the work experience;
- Participant work experience orientation sessions;
- Employer work experience orientation sessions;
- Classroom training or the required academic education component directly related to the work experience;
- Incentive payments directly tied to the completion of work experience; and
- Employability skills/job readiness training to prepare youth for a work experience.

Supportive services are a separate program element and cannot be counted toward the work experience expenditure requirement, even if supportive services assist the youth in participating in the work experience.

This element is a critical component in the youth program, as it is the only element that has a minimum percentage of expenditure requirements. WIOA requires a minimum of 20% of local area youth funds to be expended on work experience. Please note that:

- Local area administrative funds not subject to 20% requirement; and
- Leveraged resources cannot count toward the 20%.

Work experiences must include academic and occupational education:

- The educational component may occur concurrently or sequentially with the work experience;
- The academic and occupational education component may occur inside or outside the work site;
- The work experience employer can provide the academic and occupational component or such components may be provided separately in the classroom or through other means;
- Local areas have the flexibility to decide who provides the education component;
- The academic and occupational education component refers to contextual learning that accompanies a work experience. It includes the information necessary to understand and work in specific industries and/or occupations;
- Local programs have the flexibility to determine the appropriate type of academic and occupational education necessary for a specific work experience.

Categories of work experience. WIOA identifies four categories of work experience:

- Summer employment opportunities and other employment opportunities throughout the year;
- Pre-apprenticeship programs;
- Internships and job shadowing; and
- On-the-job training opportunities.

Please remember that the job shadowing work experience is a temporary, unpaid exposure to the workplace in an occupational area of interest to the participant.

#### *Program Element 4: Occupational Skills Training*

Element Four is an organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels. Local areas must give priority consideration to training programs that lead to recognized postsecondary credentials that align with in-demand industry sectors or occupations in the local area.

Such training must:

- be outcome-oriented and focused on an occupational goal specified in the individual service strategy;
- be of sufficient duration to teach the skills needed to meet the occupational goal; and
- lead to the attainment of a recognized postsecondary credential.

The Department of Labor and the State of Oklahoma allow WIOA Individual Training Accounts (ITAs) for OSY, ages 16 to 24, using WIOA youth funds, when appropriate. ITAs allow participants the opportunity to choose the training provider that best meets their needs. To receive funds from an ITA, the training provider must be on the Eligible Training Provider List. However, the Department of Labor prohibits the use of youth program-funded ITAs for ISY. In-school youth between the ages of 18 and 21 may co-enroll in the WIOA Adult program if the young adult's individual needs, knowledge, skills, and interests align with the WIOA Adult program and may receive training services through an ITA funded by the Adult program.

The State of Oklahoma allows competitive procurement of ISY occupational skills training. The process is detailed in Attachment B. This process is also supported by DOL's National Office.

#### *Program Element 5: Education offered concurrently with workforce preparation and training for a specific occupation*

Element Five reflects an integrated education and training model (IET) and describes how workforce preparation activities, basic academic skills, and hands-on occupational skills training are to be taught within the same time frame and connected to training in a specific occupation, occupational cluster, or career pathway.

*This program element refers to the concurrent delivery of:*

Program Element 2: Alternative Secondary School Services or Dropout Recovery Services;

Program Element 3: Work Experience; and

Program Element 4: Occupational Skills Training.

#### *Program Element 6: Leadership Development Opportunities*

Element Six includes opportunities that encourage responsibility, confidence, employability, self-determination, and other positive social behaviors such as:

- Exposure to postsecondary educational possibilities;
- Community and service learning projects;
- Peer-centered activities, including peer mentoring and tutoring;
- Organizational and teamwork training, including team leadership training;
- Training in decision-making, including determining priorities and problem-solving;
- Citizenship training, including life skills training such as parenting and work behavior training;
- Civic engagement activities which promote the quality of life in a community; and
- Activities that place youth in a leadership role

#### *Program Element 7: Supportive Services*

Element Seven includes services that enable an individual to participate in WIOA activities. These services include, but are not limited to:

- Linkages to community services;
- Assistance with transportation;
- Assistance with child care and dependent care;
- Assistance with housing;
- Needs-related payments for (youth ages 18-24 enrolled in WIOA youth training services)
- Assistance with educational testing;
- Reasonable accommodations for youth with disabilities;
- Legal aid services;
- Referrals to health care;
- Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eyeglasses and protective eyewear;
- Assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary education classes; and
- Payments and fees for employment and training-related applications, tests, and certifications.

#### *Program Element 8: Adult Mentoring*

Element Eight defines the timeframe for adult mentoring as lasting at least 12 months. Adult mentoring may take place both during the program and following exit from the program. It may be a formal relationship between a youth participant and an adult mentor that includes structured activities where the mentor offers guidance, support, and encouragement to develop the competence and character of the mentee:

- The local youth program must match the youth with an individual mentor with whom the youth interacts on a face-to-face basis;
- Mentoring may include workplace mentoring where the local program matches a youth participant with an employer or employee of a company;
- Case managers are allowed to serve as mentors in areas where adult mentors are scarce.

### *Program Element 9: Follow-up services*

Element Nine includes critical services provided following a youth's exit from the program to help ensure the youth is successful in employment and/or postsecondary education and training. Follow-up services may include regular contact with a youth participant's employer and assistance in addressing work-related problems as they arise.

Follow-up services may begin immediately following the last expected date of service in the Youth program when no future services are scheduled. Follow-up services do not change the exit date or trigger re-enrollment in the program.

Five program elements are permitted as follow-up services during the follow-up period:

- Supportive Services;
- Adult Mentoring;
- Financial Literacy Education;
- Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and
- Activities that help youth prepare for and transition to postsecondary education and training.

**Please note:** Any program element other than the 5 listed above requires reenrollment in the program for a youth to receive it.

Also note these additional requirements:

- All youth participants must be offered an opportunity to receive follow-up services that align with their individual service strategies for a minimum of 12 months unless the participant declines to receive follow-up services or the participant cannot be located or contacted.
- The types of services provided and the duration of services must be determined based on the needs of the individual, and therefore, the type and intensity of follow-up services may differ for each participant.
- Follow-up services must include more than only a contact attempted or made for securing documentation in order to report a performance outcome;
- Local programs should have policies in place to establish how to document and record when a participant cannot be located or contacted.
- At the time of enrollment, youth must be informed that follow-up services will be provided for 12 months following exit. If at any point in time during the program or during the 12 months following exit, the youth requests to opt out of follow-up services, they may do so.

### *Program Element 10: Comprehensive guidance and counseling*

Element Ten includes comprehensive guidance and counseling that provides individualized counseling to participants. This includes drug and alcohol abuse counseling, mental health counseling, and referral to partner programs, as appropriate.

When referring participants to necessary counseling that cannot be provided by the local youth program or its service providers, the local youth program must coordinate with the organization it refers to in order to ensure continuity of service. When resources exist within the local program or its service providers, it is allowable to provide counseling services directly to participants rather than refer youth to partner programs.

### *Program Element 11: Financial Literacy Education*

Element Eleven is financial literacy education. Youth providers may use the free resource below to deliver “Financial Literacy Education,” which will satisfy this specific Youth Program Element. The State of Oklahoma released this resource to local areas in 2015 and it continues to be a viable tool.

- Developed by the Consumer Financial Protection Bureau (CFPB), Federally Sponsored;
- It is a financial empowerment toolkit for social programs to equip frontline staff with fundamental financial empowerment principles; an understanding of consumer protection issues, tools, and skills to help clients understand what financial empowerment and stability mean for them; and guidance on referring clients to other related local financial empowerment services.
- Link: <http://www.consumerfinance.gov/your-money-your-goals/>
- Videos: <https://www.youtube.com/watch?v=Q-3X6ciTjP0&feature=youtu.be&list=PLrfmdUIWzRF2-wzQbJJaR3vVERdc3Thqk>

Program element 11 may include activities:

- To support the ability of participants to create budgets, initiate checking and savings accounts at banks, and make informed financial decisions;
- To support participants in learning how to effectively manage spending, credit, and debt, including student loans, consumer credit, and credit cards;
- That teach participants about the significance of credit reports and credit scores, what their rights are regarding their credit and financial information, how to determine the accuracy of a credit report, how to correct inaccuracies, and how to improve or maintain good credit;
- That support a participant’s ability to understand, evaluate, and compare financial products, services, and opportunities and to make informed financial decisions;
- That educate participants about identity theft, ways to protect themselves from identity theft, and how to resolve cases of identity theft, and in other ways understand their rights and protections related to personal identity and financial data;
- That support activities that address the particular financial literacy needs of non-English speakers, including providing support through the development and distribution of multilingual financial literacy and education materials;
- That support activities that address the particular financial literacy needs of youth with disabilities, including connecting them to benefits planning and work incentives counseling;
- That provides financial education that is age appropriate, timely, and provides opportunities to put lessons into practice, such as by access to safe and affordable financial products that enable money management and savings; and
- Implement other approaches to help participants gain the knowledge, skills, and confidence to make informed financial decisions that enable them to attain greater financial health and stability by using high-quality, age-appropriate, and relevant strategies and channels, including, where possible, timely and customized information, guidance, tools, and instruction.

### *Program Element 12: Entrepreneurial Skills Training*

Element Twelve includes entrepreneurial skills training, which provides the basics of starting and operating a small business. Such training must develop the skills associated with entrepreneurship. Such skills may include, but are not limited to the ability to:

- Take initiative;
- Creatively seek out and identify business opportunities;
- Develop budgets and forecast resource needs;

- Understand various options for acquiring capital and the trade-offs associated with each option; and
- Communicate effectively and market oneself and one's ideas.

Approaches to teaching youth entrepreneurial skills may include, but are not limited to:

- Entrepreneurship education that provides an introduction to the values and basics of starting and running a business. Entrepreneurship education programs often guide youth through the development of a business plan and also may include simulations of business start-up and operation,
- Enterprise development which provides support and services that incubate and help youth develop their own businesses. Enterprise development programs go beyond entrepreneurship education by helping youth access small loans or grants that are needed to begin business operation and by providing more individualized attention to the development of viable business ideas; and
- Experiential programs that provide youth with experience in the day-to-day operation of a business. These programs may involve the development of a youth-run business that young people participating in the program work in and manage. Or, they may facilitate placement in apprentice or internship positions with adult entrepreneurs in the community.

*Program Element 13: Services that provide labor market information*

Element Thirteen includes services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services.

WIOA youth programs and providers should become familiar with state and federal LMI data and LMI tools, which are provided for free by agencies, in order to share relevant LMI with youth. DOL electronic tools particularly relevant to youth include My Next Move at <https://www.mynextmove.org/>, and Get My Future at <https://www.careeronestop.org/GetMyFuture>.

Another resource available is OKCareerGuide.org at <https://okcareerguide.kuder.com/landing-page>, where youth can learn about their interests, skills and values with Journey's research-based assessments; plan their education and career goals based on real-time assessments; and succeed by making confident career choices via Journey's career planning tools.

*Program Element 14: Postsecondary preparation and transition activities*

Element Fourteen prepares ISY and OSY for advancement to post-secondary education after attaining a high school diploma or its recognized equivalent. These services include exploring post-secondary education options, including technical training schools, community colleges, 4- year colleges and universities, and Registered Apprenticeship.

Additional services include, but are not limited to:

- Assisting youth to prepare for SAT/ACT testing;
- Assisting with college admission applications;
- Searching and applying for scholarships and grants;
- Filling out the proper Financial Aid applications and adhering to changing guidelines; and
- Connecting youth to postsecondary education programs such as OkCollegeStart.org at <https://www.okcollegestart.org/>.

## Special Projects Proposed

Proposers may wish to present information on any special projects that the proposer believes will be of benefit to workforce customers. Should these special projects require an additional expenditure of funds, the proposer should include an estimate of the additional amount needed, but should not include those costs in the proposal budget.

## National Emergency Grant/Competitive Grants

If National Emergency Grants the service provider must provide services to those new dislocated workers. If new National Emergency Grants are received which require additional staffing to provide services, the service provider, and the SWB may negotiate a modification to the service provider contract for any additional costs that are required in providing these services. If the SWB receives any other grants that include services being delivered in a one-stop environment, then the service provider, and the SWB may negotiate a modification to the existing contract or any additional costs required in providing these services.

## 7. Technical Assistance to Proposers

For questions about the RFP or SWB, please submit any questions in writing via electronic mail no later than 5:00 pm May 8, 2026 CDST \* to:

Contact Name: Kerry Manning  
Address: 3202 W. University  
P.O. Box 744  
Durant, Oklahoma 74702  
Phone Number: 580-745-5397  
E-mail address: [kmanning@swb-ok.com](mailto:kmanning@swb-ok.com)

Answers to all submitted questions will be posted at [www.swb-ok.com](http://www.swb-ok.com).

Proposers must also be aware that, in addition to the WIOA and Regulations, there are certain policies and guidance issued by the State Administrative Entity, the Oklahoma Employment Security Commission (OESC). Those policies and guidance are provided to the local workforce development areas in the form of Workforce System Directives (WSD) , and also in the form of Memorandums or Technical Assistance. These guides are available to the public through the Oklahoma Works website at [www.employoklahoma.gov](http://www.employoklahoma.gov).

**Proposers should review the policies and memorandums that apply to WIOA Title I programs, as the Contractor chosen will be required to comply with those documents.**

Demographics and Labor Market Information specific to the Southern Workforce Development Area are available through the websites of the Southern Workforce Board, Oklahoma Department of Commerce [www.OKcommerce.gov](http://www.OKcommerce.gov), and Oklahoma Employment Security Commission: <http://www.oesc.state.ok.us>. Labor market information specific to this workforce development area is available.

Questions via e-mail should be submitted to: [kmanning@swb-ok.com](mailto:kmanning@swb-ok.com)

For general information only, the SWB estimated planning client dollars for PY26 are 589,000 Adult funding and \$138,000 in Dislocated Worker funds, and \$569,000 Youth funds. This level of client funding is dependent on the actual funding received by OESC.

## **8. Budget Information**

Budget forms are provided in Section 9 (Attachment B) of this RFP. Those forms are to be used to present your proposed budget. Please include a budget for the period July 1, 2026, through June 30, 2026.

Indirect costs and allocated costs can be charged to the contract only if the proposer has an approved indirect cost plan or cost allocation plan included with the budget. The budget should be presented for the period of time that is shown in the Dates and Deadlines section of this RFP. The Budget Information Forms should be used and must be completed by detailed line items. Multiple pages of these forms may be necessary. If multiple pages are used, please label them appropriately.

Proposers should include detailed costs such as, but not limited to:

- Staff Salaries
- Staff Fringe Benefits
- Payroll Taxes
- Unemployment Insurance
- Workers Compensation
- Health Insurance
- Retirement
- Copying/Printing
- Dues/Fees
- General Insurance
- Postage/Freight
- Office Supplies
- Telephone/Communication
- Contract Management (if applicable)
- Indirect Costs (if applicable)

Proposers should include a copy of their most recent Negotiated Indirect Cost Rate Agreement, if applicable.

The actual costs incurred during the performance of the contract will be distributed among various cost categories and funding streams. That distribution will be based upon the contractor's cost allocation plan. The amount of funds available per funding streams (Adult, Dislocated Worker, and Youth) will be identified during the contract negotiations and included in the contract.

## **9. Proposal Evaluation Criteria**

Proposals received after the deadline will not be reviewed or considered for funding. The signature page must be complete, signed, and notarized, or the proposal will not be considered.

A proposal must receive at least 140 points to be considered. A proposal receiving fewer than 140 points will be considered unacceptable. The maximum total points that can be awarded is 200.

The following criteria will be used to evaluate all proposals. The evaluators will award some, all, or none of the points that are shown for each evaluation item.

Evaluation Item	Range	Maximum Points
<b>Format and Completeness.</b> (A) Up to 10 points may be deducted if the proposal submitted does not follow the prescribed format or if other forms are not satisfactorily completed.	0 - (-10)	0
Delivery of The Services Required In the RFP (B)	0 - 35	35
Qualifications of Staff (C)	0 -20	20
Performance Measures (D)	0 - 30	30
Previous Experience (E)	0 - 25	25
Monitoring and Self-Evaluation (F)	0 - 10	15
Budgets (G)	0 - 35	35
Administrative Ability (H)	0 - 10	15
Demonstrated Knowledge of Programs, Objectives (All)	0 - 25	25
Totals	(-10) - 200	200
Small, Minority, Women's and Labor Surplus	+5	

## 10. Proposal Instruction and Proposal Outline

One (1) signed original and (1) electronic copy. The original and copies MUST be submitted in a sealed envelope with the proposer's name and the words: Proposal for SWB Workforce Innovation and Opportunity Act Service Provider of Adult/Dislocated Worker and Youth Programs written on the exterior of the envelope. Use only white letter sized paper in preparing your proposal.

### Forms/Outline to Be Used By Proposers

This page is only for instructions and should not be included as a part of the completed proposal.

When completed, your proposal must be in the following sequence:

1. The cover page
2. The narrative sections (A-H)
3. The Certifications and Signature section (I)
4. Budget Information Forms (Attachment B)
5. Projected Performance Form (Attachment A)
6. Most recent audit report & monitoring reports

All pages must be numbered. The cover page must be page #1. Please check the formatting of the pages containing charts. Each of those pages should fit on a single page.

Your completed proposal must be submitted to the location and within the time limits as shown in the RFP package.

## 11. Attachments

### Cover Page

Proposal For: Integrated Services for Adults, Dislocated Workers and Youth Framework

To: Southern Workforce Board

Proposer Information

Legal Name: Address:

Date This Proposal Was Prepared:

Proposers Federal Tax Identification Number:

Total Budget of This Proposal: \_\_\_\_\_ \$

### Proposers Contact Information and Description of Organization.

(Page Limit – 2)

The proposer should name a responsible person as the contact person. This individual should be familiar with the capabilities of the proposing organization, have knowledge in contracting, including financial budgets, and should have the authority to negotiate contractual issues on behalf of the proposer.

1. Include the full name, title, address, telephone numbers, fax numbers, e-mail addresses, etc.
2. Include a description of the entity type and the principal functions that are performed by the proposer entity.
3. Include an organizational chart showing names and positions.
4. Include data on how long your organization has been in business and how long your organization has been providing services similar to those being proposed.
5. Format and completeness of the overall proposal. Required forms attached.

### Prepare a narrative outlining how you will provide the staff required in the RFP. (Page Limit – 8)

1. Describe how you plan to deliver each of the services.

2. Describe how you will deliver the services in the context of the One Stop System and Integrated/Functional Systems, while specifically addressing how you will handle positions that utilize part-time staff in locations.
3. Describe how staff will work with One Stop Partner staff to achieve an integrated system where customer service and performance are high priorities.
4. Describe your organizational philosophy on community involvement of service delivery staff with local organizations, agencies, schools, Chambers of Commerce, etc., and participation of staff on boards and committees throughout the region.
5. Include a description of any special projects that the proposer feels would be of benefit to workforce customers.
6. Include a description of the specific challenges that the general population and WIOA Title I eligible adults and dislocated workers face in maintaining self-sufficiency in today's economy and workforce.
7. Include a description of your perceived role in providing services to dislocated workers who are receiving services through National Emergency Grant or Trade Adjustment Assistance.
8. Include a description of your perceived role in providing services to eligible youth who are receiving services.

### **Qualifications of Staff. (Page Limit - 2)**

1. Describe the qualifications for staffing that will be providing services to the customers.
2. If staff have already been selected for this project, provide the names and prior experience of each staff member.

### **Performance and Performance Measures. (Page Limit - 2)**

1. Prepare a narrative relating your understanding of each of the performance measures, including state and federal core measures.
2. Explain fully the steps you will take to assist the local workforce system in meeting the performance measures. Complete Projected Performance Form.
3. Describe successful performance in the entity's history with workforce development programs.

### **Previous Experience. (Page Limit - 5)**

1. Describe your previous/current experience in delivering similar programs or services.

2. Provide data that will show the demonstrated effectiveness of those programs or services. This should include financial as well as programmatic demonstrated effectiveness.
3. Describe past experience with service integration, functional supervision, information sharing, joint case management of mutual clients, cross training of staff.
4. Describe past experience in the development of Individual Employment Plans (or similar terminology) for programs similar to WIOA. Include the entity name, contact person, and telephone number of references.

Monitoring and Self-Evaluation. (Page Limit – 2)

1. Describe the monitoring and self-evaluation procedures that will be followed. This should include the processes, the activities that will be monitored, who is responsible for the monitoring, and procedures by which deficiencies noted are corrected.
2. Include a description of the self-evaluation procedures that will be followed for analyzing expenditures versus budget or other measurements.
3. Include your audit plan timeline.
4. Include a copy of the most recent audit and Board or Management letter regarding audit. (audit not included in page limitation)

**Budgets. (Page Limit - 2) (Budget forms not included in page limit)**

Present a program budget by line item using the Budget Information Forms. Proposers should refer to the Budget Information section of the RFP for additional information regarding budget content. This section should include the Budget Information Forms and the In-Kind Contributions Form.

If the proposer wishes to make comments on the budgets, the proposer should prepare a narrative that includes those comments.

**Present a Statement of Administrative Ability. (Page Limit - 2)**

1. Include a statement explaining the systems that you have in place and how they will provide the administrative support that is necessary to carry out their tasks.
2. Include a description of financial systems and include a narrative describing your cost allocation plan.
3. Describe systems that are in place to prevent overspending of funds.
4. Describe procedures that are in place to ensure proper charging of costs to cost categories, grants and contracts, and other cost objectives.

## **12. Certifications and Signature**

### **Certificate Regarding Equal Employment Opportunity**

Except as otherwise provided under 20 CFR Part 667.275, all contracts that meet the definition of “federally assisted construction contract” in 38 CFR Part 36.4391 must include the equal opportunity clause provided under 38 CFR 36.4392, in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 CFR part 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”

### **Certificate Regarding Contract Work Hours and Safety Standards Act (40 U.S.C. 327-333)**

Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

### **Certificate Regarding Rights to Inventions Made Under a Contract of Agreement**

If the Federal award meets the definition of “funding agreement” under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.

### **Certificate Regarding Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended**

Contracts and sub-awards grants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

### **Certificate Regarding Debarment and Suspension (2 CFR 215.13, 2 CFR 180, and Executive Orders 12549 and 12689)**

A contract award (see 2 CFR 180.220) must not be made to parties listed on the government-wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or

otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

### **Certificate Regarding Byrd Anti-Lobbying Amendment (2 CFR 200.450 and 31 U.S.C. 1352)**

Contractors that apply or bid for an award must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

### **Certificate Regarding Audit and Access to Records**

Contract certifies that it will comply with the Uniform Guidance, will provide notice of the completion of required audits and any adverse findings which impact this sub-award as required by 2 CFR parts 200.501-200.521, and will provide access to records as required by 2 CFR parts 200.336, 200.337, and 200.201, as applicable.

### **Certificate Regarding Conflict Of Interest**

The Southern Workforce Board, Inc., maintains a written code of conduct that governs the performance of its Board Members, employees, and agents engaged in the award and administration of contracts.

The proposer certifies that it is either not aware of any potential conflicts of interest between itself and the Southern Workforce Board, Inc., or that if there is a potential conflict of interest between itself and the Southern Workforce Board, Inc., the proposer shall declare this potential conflict of interest below.

### **Certificate Regarding Compliance with Federal Laws**

The proposer certifies that it is in compliance with:

- Americans with Disabilities Act of 1990
- Age Discrimination Act of 1976
- Civil Rights Act of 1964
- Drug-Free Workplace Act of 1988
- Hatch Act, the Pro Children Act of 1994
- Title IX of the Education Amendments of 1972, 31 U.S.C. Section 1352, Public Law 105-78
- Section 504 of the Rehabilitation Act of 1973 (as amended)
- Single Audit Act of 1984, as applicable
- Executive Orders 11246 and 11375

The proposer certifies that it will provide guidelines for client grievance procedures.

### **Certification of Intent to Participate in the One Stop Delivery System (TEGL No. 16-16)**

The proposer certifies that it, if selected for a contract through this proposal, agrees to support the WIOA One Stop concept and agrees to establish a cooperative and mutually beneficial relationship between the One Stop Partners to participate in the planning and implementation of individual and mutual duties, obligations, and responsibilities under WIOA. The proposer certifies that it will participate in the local integration plan and will fully participate in the integrated delivery of services that have been approved by the SWB.

### **Certification of Indemnification**

The proposer certifies that it is aware that an indemnification clause will be included in the contract that is awarded as a result of this proposal. The proposer certifies that it is aware that the indemnification clause will state that the proposer (contractor) shall indemnify and hold harmless the Southern Workforce Board, Inc., the Southern Workforce Board, Inc., officers, agents, and employees and the Southern WIOA Local Elected Officials from liability of any nature and kind, including costs, expenses, and attorney fees, for or on account of any actions, claims, suits, and damages of any character whatsoever arising out of any negligent act or omission of the proposer (contractor) or any of its employees, agents, volunteers, subcontractors, or representatives.

### **Certificate Regarding Cost**

The proposer certifies that to the best of its knowledge and belief, the cost data submitted is accurate, complete, and current at the time this proposal is submitted.

### **Certificate Regarding Transitioned Clients**

The proposer certifies that it will honor the original plan of service to all clients that are being transitioned from a previous service provider. Clients that are “transitioned” are those eligible participants that are receiving WIOA services and have been registered as a WIOA client prior to the effective date of the contract arising from this RFP. The proposer certifies that services to those transitioned clients will not be interrupted.

### **Certificate Regarding RFP Content**

The proposer certifies that it has read all of the information presented in the RFP. The proposer certifies that it understands that the contract that will arise from this RFP will have the conditions, stipulations, and requirements that are stated in the RFP and that the contract will have other legal provisions that are standard and customary contract provisions, but which are not specifically shown in this RFP.

The proposer (proposer’s representative) being duly sworn upon oath, deposes and says:

- That I executed the accompanying proposal on behalf of the Proposer, and that I had the lawful authority to do so.
- That the prices in this proposal have been arrived at independently.
- That the Proposer has not directly or indirectly entered into any agreement, express or implied, with any other actual potential proposer or Proposers having for its objective the controlling of the amounts of proposals, or the limiting of the number of proposals or proposers.
- That the Proposer has not paid, given or donated or promised to pay, give or donate to the SWB and/or the Fiscal Agent or any officer or employee of the SWB and/or the Fiscal Agent any money or other thing of value, including any special consideration, either directly or indirectly, in seeking to procure this contract.
- That, unless otherwise required by law, the prices quoted in this proposal have not been and will not be knowingly disclosed by the Proposer until after proposals are opened.
- I understand that this proposal represents a legal offer to provide the services herein described, at the prices stated herein. This proposal is binding for a period of 60 days from the date submitted.
- That, by signing and submitting this proposal, the proposer agrees to each of the certifications contained in this proposal.

\_\_\_\_\_  
Signature of Proposers Representative

\_\_\_\_\_  
Typed Name and Title

\_\_\_\_\_  
Name of Proposer

Subscribed and sworn to before me this \_\_\_\_ day of \_\_\_\_, 20 \_\_\_\_.

\_\_\_\_\_  
Notary Public

SEAL

My Commission Expires \_\_/\_\_/\_\_

**Attachment B**  
**Proposed Budget**

Proposed Budget – WIOA Title I Services (Need a budget for each service program proposed)

Proposed Budget Summary July 1, 2026 - June 30, 2027

Counties Served: \_\_\_\_\_

	Cost	% of Total
<b>Staff Salaries:</b>		
<b>Staff Fringe:</b>		
<b>Staff Travel/Training:</b>		
<b>Copying/Printing</b>		
<b>Dues/Fees</b>		
<b>General Insurance</b>		
<b>Office Supplies</b>		
<b>Postage/Freight</b>		
<b>Telephone/Communication/Internet</b>		
<b>Program Management/Support Staff:</b>		
<b>Profit If Applicable:</b>		
<b>Total Proposed Cost Reimbursement Budget:</b>		

**Budget Information Forms**

Proposer Name: \_\_\_\_\_

**Budget For Period: 7/1/2026 - 6/30/2027**

Detailed Budget Item	Basis for Determining Amount	Adult/DLW	Youth	Total Cost



**Direct Programmatic Costs: Leveraged from other Program/Resources:**

# of Positions	Title (must be described below)	Gross Monthly Salary(\$)	% of Time	# of Months	WIOA Total Cost (\$)	Other Program Name	Salary %	Other Program Total	Both: WIOA and Other Program(s) Total (\$)

## Attachment C

Period of Performance: July 1, 2026 through June 30, 2027				
Projected <i>Cumulative</i> Participant Service Levels	Ending 9/30/26	Ending 12/31/26	Ending 3/31/27	Ending 6/30/27
Adults/DLWs Enrolled				
Adults/DLWs Received a certificate, credential, secondary school diploma or equivalent after training completion				
Adults/DLWs Employed at Training Completion 1 <sup>st</sup> Quarter				
Adults/DLWs Retained Employment 2 <sup>nd</sup> Quarter after Training completion				
Direct Customer Dollars spent for Training Services				
Clients Entering On-the-Job Training and/or Registered Apprenticeship				
Adult/DLW enrolled in Training that received a measurable skill gain				

Period of Performance: July 1, 2026 through June 30, 2027				
Projected <i>Cumulative</i> Participant Service Levels	Ending 9/30/26	Ending 12/31/26	Ending 3/31/27	Ending 6/30/27
Youth Enrolled				
Youth who do not have a HS Diploma or Equivalence will have obtained a HS Diploma or Equivalence prior to exit				
Youth enrolled that an Offender, Transitioning Foster Youth, Foster Youth or Drop Out				
Youth that achieved a measurable skill gain				
Placement in Education or Employment 2 <sup>nd</sup> quarter after exit				
Attainment of Degree or Certificate after Training Service Completed				
Youth Entering On-the-Job Training and/or Registered Apprenticeships				
Youth Completing Individual Service Plan Goals (Work Readiness Included)				

## Certification Regarding Debarment, Suspension, and Other Responsibility Matters

### Primary Covered Transactions

#### Applicant Organization

This certification is required by the regulations implementing Executive Order 12549 and 12689, Debarment and Suspensions and 2 CFR Part 180—Grants and Agreements

1. The prospective subrecipient, (i.e., grantee) certifies to the best of its knowledge and belief, that it and its principals:
  - a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
  - b. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  - c. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and
  - d. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State, or local) terminated for cause or default.
2. Where the prospective subrecipient is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

---

Signature

Date

---

Typed name and Title of Authorized Representative

## Certification Regarding Drug-Free Workplace Requirements

This certification is required by the regulations implementing the Drug-Free Workplace Act of 1988, 29 CFR Part 98, section 98.305, section 98.320 and Subpart F, as amended in Volume 60 of the Federal Register on June 26, 1995 at 29 CFR section 98.600.

The grantee certifies that it will or will continue to provide a drug-free workplace by:

- A. Publishing a policy statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition;
- B. Establishing an ongoing drug-free awareness program to inform employees' about—
  - 1. The dangers of drug abuse in the workplace;
  - 2. The grantee's policy of maintaining a drug-free workplace;
  - 3. Any available drug counseling, rehabilitation, and employee assistance programs; and
  - 4. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.
- C. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph A.
- D. Notifying all employees in the Statement required by paragraph A. that, as a condition of employment under the grant, the employee will—
  - 1. Abide by the terms of the statement; and
  - 2. Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction.
- E. Notifying the agency in writing, within ten calendar days after receiving notice under paragraph D.2. from an employee or otherwise receiving actual notice of such conviction Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant.
- F. Taking one of the following actions, within 30 calendar days of receiving notice under paragraph D.2., with respect to any employee who is so convicted –
  - 1. Taking appropriate personnel action against such an employee, up to and including termination consistent with the requirement of the Rehabilitation Act of 1973, as amended; or
  - 2. Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;
- G. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (A), (B), (C), (D), (E), and (F).

---

Typed Name of Certifying Official

---

Signature

---

Date

## Certification Regarding Lobbying

### Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an Officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants and contracts under grants, loans, and cooperative agreements) and that all sub recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for or entering into this transaction imposed by Section 1352, Title 31, U. S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

---

Signature

Date

---

Typed name and Title of Authorized Representative

**Certificate Regarding Conflict of Interest**

By signing and submitting this Certificate Regarding Conflict of Interest the undersigned covenants that no officers, members or employees of its governing board have any interest, and that none shall acquire any interest, direct or indirect, that would conflict with full and complete execution of this contract. Contractor further covenants that in the performance of this contract, no person having any such interest will be employed

No employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in the firm selected for an award. The officers, employees, and agents of the recipient shall neither solicit nor accept gratuities, favors or anything of monetary value from contractors, or parties to sub agreements.

---

Signature

Date

---

Typed Name and Title of Authorized Representative

## **Southern Workforce One-Stop Center's Product Box**

**These Products May be Delivered Directly by One-Stop Staff or by referral process**

### **Orientation/Informational**

- Labor Market Information
- Supportive Service Information
- UI Information
- Self Service/Job Referral
- Demand Occupational Information
- Financial Aid Information
- Follow Up Services
- Training Provider Information
- Initial Skills Assessment
- Veterans Service Information
- Career Consultation
- Youth Services
- Dislocated Worker Information

### **Talent Improvement (Short-Term Pre-Vocational) – Skills Improvement**

- Job Readiness /Soft Skill/ Life Skills /DVD and Workbook
- High School Equivalency Preparation
- Mousearobics [www.pbclibrary.org/mousing/mouserercise.htm](http://www.pbclibrary.org/mousing/mouserercise.htm)
- Microsoft Tutorials (<http://www.microsoft.com/education/tutorials.msp>)
- Online Talent Improvement [www.gcflearnfree.org](http://www.gcflearnfree.org)
- High School Equivalency (HSE) Preparation (TASC, GED, or HiSet)
- Grow with Google: <https://oklahoma.gov/libraries/digital-resources/grow-google.html>

### **Job Search Skills**

- Interviewing Preparation
- Resumes and Application
- Job Search Overview
- Customized Resume Assistance
- Customized Labor Market Information
- Job Referrals

### **Occupational Training /Credentialing Opportunities /Skill Development Lab Opportunities**

- Occupational Training
- OJT/Customized Training Opportunities
- Registered Apprenticeships
- Work Experience
- ITA
- IEP
- Case Management
- Supportive Services
- Paid Pre-Vocational Classes
- Comprehensive Assessment

- Individual Career Management
- Career Planning
- Proficiency Testing

#### **Employer Based Services**

- Job Fairs (virtual and/or in-person)
- Customized Labor Market Information
- Employer Application Management (self-assisted and staff-assisted)
- Mass Hiring Events
- Lay-off Aversion and Rapid Response
- Job Order Management
- Registered Apprenticeships
- Skills Based Hiring
- WOTC Tax Credit
- Federal Bonding
- Pre-employment Skills Assessment
- Referral Management