REQUEST FOR PROPOSALS

Partnership. Accountability. Training. Hope.

(PATH)

Contract Period

October 1, 2024 – September 30,2025
Macomb/St. Clair Workforce Development Board has the option to extend the contract up to two additional program years.

Macomb/St. Clair Workforce Development Board
21885 Dunham Rd. Suite 11
Clinton Township, MI 48036

Response Due Date: Tuesday, July 16, 2024, by 12:00 PM (EST)

Small, minority, and women's businesses are encouraged to apply.

REQUEST FOR PROPOSALS
PARTNERSHIP. ACCOUNTABILITY. TRAINING. HOPE. (PATH)
PROGRAM SERVICES

INTRODUCTION

The Macomb/St. Clair Workforce Development Board (M/SCWDB), a non-profit equal opportunity employer is part of a comprehensive workforce development system identified as Michigan Works! agencies. Funded by the State of Michigan, the Department of Labor and Economic Opportunity (LEO) is the state agency designated to receive PATH funds and implement its provisions.

Michigan Works! Career Centers offer services designed to help businesses connect with a skilled workforce and to help job seekers access meaningful employment and careers. As one of sixteen Michigan Works! agencies (MWA's) in the state, the M/SCWDB oversees a comprehensive workforce development system in Macomb and St. Clair counties with a vision to be the premier resource for workforce development and retention and a mission to connect and support employers and job seekers to strengthen the economy and community.

The M/SCWDB administers federal employment and training programs in three Michigan Works! Career Centers in Macomb County and one Career Center in St. Clair County. The Michigan Works! Career Centers serve as access points for job seekers and the business community to use an array of employment-related services and tools. Job seekers looking for a first job or better job, individuals facing a career transition, or seeking new skills, can turn to Michigan Works! programs. Michigan Works! offers activities designed to assist job seekers including no-cost assistance in creating resumes, job search strategies, mastering interviews, hiring events, veteran's services, career navigation resources and connections to community resources.

Opportunities for job seekers to receive tuition assistance for vocational training to update existing skills or to obtain new skills in demand occupations are available to eligible individuals. On-the-job training (OJT) is also available for individuals who need to master new or specialized skills for a specific job.

Programs currently accessible through the Macomb/St. Clair Michigan Works! Career Centers include Wagner-Peyser Employment Services, the State of Michigan Vocational Rehabilitation Services, the Partnership. Accountability. Training. Hope. (PATH) Program, for public assistance recipients, Trade Adjustment Assistance, Senior Community Service Employment Program, Veteran Employment Services, Business Services, and Workforce Innovation and Opportunity Act (WIOA) Adult, Youth, and Dislocated Worker Services.

STATEMENT OF PURPOSE

The Macomb/St. Clair Workforce Development Board, administering the Michigan Works! system in Macomb and St. Clair Counties, in cooperation with the Departments of Health and Human Services (DHHS) in Macomb and St. Clair counties is responsible for the administration of the Partnership. Accountability. Training. Hope. (PATH) Welfare-to-Work initiative. The PATH program is designed to enhance the employability of eligible individuals referred by the DHHS. The goal of the PATH program is to assist recipients and applicants of the Family Independence Program (FIP), who face significant barriers to success in the labor market with the skills, resources and supports necessary to move toward and achieve self-sufficiency.

Note: Because Fiscal Year 2025 funding levels and federal and state programmatic requirements are not confirmed, staffing levels and program design elements described in this request for proposal are subject to change. The contractor selected to provide PATH services for Fiscal Year 2025, must be prepared to deliver services that meet federal and state mandates.

SOLICITATION-REQUESTS FOR PROPOSALS

The M/SCWDB is seeking competitive proposals from interested and qualified agencies, public or private corporations, community-based organizations, governmental units, and others to implement and deliver PATH services. The purpose of this solicitation is to identify and select one qualified contractor to deliver PATH services in two Michigan Works! Career Centers in Macomb County and one Michigan Works! Career Center in St. Clair County.

The M/SCWDB will provide office space for contractor staff, basic office equipment and general office supplies for contractors housed in Michigan Works! Career Centers. These items should not be included in the proposer's budget. Contract staff will be identified as staff of Macomb/St. Clair Michigan Works! and will be reflected as such on business cards, correspondence, etc.

Locations

Michigan Works! Career Centers in Macomb County	
43630 Hayes, Suite 100 Clinton Township, 48038	15950 Twelve Mile Road Roseville, 48066

Michigan Works! Career Centers in St. Clair County
100 McMorran, 6th Floor Port Huron, 48060

Period of Performance
For Fiscal Year 2025 the PATH program will begin October 1, 2024, and continue through September 30, 2025. Contractors should be prepared to begin delivery of services October 1, 2024. The M/SCWDB reserves the right to extend contracts on an annual basis for two additional years based on need, performance, and available funding.

Population to be Served
All PATH participants will be referred by the Department of Health and Human Services (DHHS) offices in Macomb and St. Clair counties through the One Stop Management Information System (OSMIS). DHHS referrals include recipients and applicants for cash welfare assistance.

Since 2012 Macomb County Michigan Works! has provided PATH services to Refugees who applied for or are receiving cash assistance. Contractors should familiarize themselves with resources designed for Refugees and be able to provide comprehensive quality services to that population.

Contract staff will share responsibilities with other program staff in the Michigan Works! Career Center for facilitation of scheduled workshops such as interviewing, career planning, job search and life skills.

Planned PATH Site Locations and Activity Levels
Based on an analysis of Fiscal Year 2023 and 2024, and projected numbers of participants, it is proposed that three PATH sites will be located throughout Macomb and St. Clair Counties.

Location	Estimated Monthly Enrollment	Estimated Yearly Enrollment
Clinton Township Michigan Works! Career Center	40	480
Roseville Michigan Works! Career Center	50	600
Port Huron Michigan Works! Career Center	30	360

Required Level of Activity
To satisfy federal work participation requirements, single parents must participate in allowable work activities for 30 hours per week; single parents with a child under the age of six are required to participate for 20 hours per week. For two-parent families, one or both parents must be participating in allowable work activities for a combined total of 35 hours per week. If a two-parent family utilizes federally funded day care, the combined total is 55 hours per week.

All applicants during the Applicant Eligibility Period (AEP) will be assigned to follow the same work participation requirements they will be assigned once completing the AEP, however, assignments will be made to resolve barriers prior to entering PATH status.

To satisfy work participation requirements, all adults referred to PATH, with the exception of individuals participating in approved training programs, may be required to participate up to 40 hours per week unless the Department of Health and Human Services authorizes a lower participation requirement which will be noted in the OSMIS system at the time of the referral.

Based on federal and state requirements, the Macomb/St. Clair Workforce Development Board has defined the following as required levels of activity:

- All PATH participants will participate up to 40 hours per week in job readiness/job search activities unless a lower participation level is confirmed by the DHHS.
- All PATH participants will participate in other employment and educational activities that meet Federal and State work participation requirements.

Program Requirements

The PATH Program design incorporates a comprehensive case management approach that is participant centered. The PATH Curriculum **(Attachment A)** is the prescribed model that is offered to PATH participants at Macomb and St. Clair County PATH sites. The curriculum includes required and optional activities. Any required and optional materials including textbooks, reproducible materials, and assessments for job readiness and job search activities will be provided by the M/SCWDB and should not be included in the proposer's budget.

In addition to job readiness and job search activities described in in the PATH Curriculum, other activities include:

10-Day AEP	Participants in the 10-day AEP period will be provided with individualized assignments based on their need to remove any barriers prior to entering PATH and job searching. FIP applicants need to complete all weekly assignments to fulfill the requirements of the AEP. The quantity and extent of the applicant's weekly assignments need to be levels which will simulate the expectations of PATH.
Case Management	Contractors must provide case management activities, as necessary, to assist participants in obtaining employment at sufficient wage and hours to eliminate the need for Family Independence Program (FIP) assistance. Case management is a process for assessing needs, setting goals, determining which services are needed and providing assistance in finding and accessing those services. It includes coordinating the provision of service and offers a continuity of service while supporting individuals with successful completion and positive outcomes. Case management activities are required to be documented in the One Stop Management Information System (OSMIS) under the case note section.
Orientation	Contractors will provide orientation at a minimum of once a week at each site and will include a complete overview of AEP/PATH programs and services as well as a complete overview of all Michigan

	Works! services. Orientations will include information on how to obtain support services, participant expectations and penalties for noncompliance. Orientation materials will be developed and standardized by the Macomb/St. Clair Workforce Development Board, the required PATH Orientation Video as well as staff input.
Assessment and Development of Individual Service Strategy	Contractors must conduct an objective assessment of each participant. The objective assessment will review the basic skills, occupational skills, prior work experience, employability, interests, aptitudes, supportive service needs, academic levels, and other needs of the individual. The results of the participant's assessment are used to develop and update an individualized written plan that include short and long-term goals. This plan is referred to as the Individual Service Strategy (ISS) and is located in OSMIS. The ISS outlines services and action steps needed to prepare the customer for training and employment. The ISS is a living document, and as unanticipated needs arise during the program contract staff will be required to amend the strategies involving meeting the participant goals and removing newly identified barriers. The ISS will be reviewed regularly to end action plans and set new action plans developed to assist the participant in moving toward self-sufficiency. *Comprehensive Adult Student Assessment Systems (CASAS) is the chosen assessment tool for the M/SCWDB. Contractors must be prepared to identify specific staff who will become certified to proctor CASAS testing for PATH participants.*
Employment & Retention	Participants assigned to the PATH Program are expected to begin employment for the number of hours and at a wage that meets defined work participation requirements. A key component of the PATH Program for participants is job retention. Contract staff will provide job retention services to PATH participants every 180 days and every 180 days thereafter until the participant's case grant closes.
Training	The M/SCWDB is committed to encouraging individuals to take advantage of available training opportunities. Contract staff are instrumental in counseling PATH participants about available training. PATH participants are eligible for a variety of training opportunities including ESL, high school completion, GED preparation programs, basic skills development as well as vocational training programs in demand occupations. In some instances, training hours can be used for all or some of the required federal work requirement.
On-The-Job-Training	Employer-based training in areas that match the participant's ISS will be coordinated by contract staff in conjunction with Michigan Works! Business Service Professionals. OJT's must be full-time

	employment at a minimum of $14.00 per hour. Following the OJT component, PATH participants will receive job retention services for a minimum of 180 days and then every 180 days until their cash grant closes.
Non-English Speaking	All contract staff must be prepared to assist with job readiness and job placement for PATH participants who have limited English speaking skills and who do not participate in English as a Second Language (ESL) services to fulfill work participation requirements.
Supportive Services	MWA's are required to provide employment-related supportive services for all FIP applicants and recipients. Contract staff will be required to assist the participant in gathering the appropriate information needed to apply for supportive services through the M/SCWDB. The majority of supportive services will be approved and processed through the M/SCWDB Administration offices. It will be the responsibility of the service provider to collect receipts within seven days and return them to the accounting department of the M/SCWDB. It is often timelier and more efficient for the contractor to have the ability to issue supportive service payments in-house in lieu of relying on M/SCWDB internal processes for support service payments. Reimbursement requests are billed outside of the contract and sent to the PATH Program Coordinator monthly with backup documentation logs. It is the responsibility of the contractors to collect and maintain receipts. The category of support service to be issued by the contractor will be determined during contract negotiations. Any service outside of what is negotiated requires prior approval by the PATH Program Coordinator. Contractors may be asked to purchase participant laptops and provide technical assistance. This would be billed outside of the contract and should not be included in the proposer's budget.
Data Verification	Complete and accurate documentation of all hours of participation will be a requirement of the contract staff. On a monthly schedule staff will be provided with a list of participants which will have been chosen by the state for data verification and/or internal controls. Contract staff will have no more than two (2) days to provide the M/SCWDB with the appropriate documentation representing the number of hours entered in OSMIS.

Participant File Maintenance

The Michigan Works! One-Stop Management Information System (OSMIS) is the participant registration and reporting system required by the State of Michigan Department of Labor and Economic Opportunity for statewide participation tracking. Contractors will use this system to record enrollments, activities, case noting and to update the Individual Service Strategy (ISS).

The ISS is a comprehensive individualized management tool that will be used by contractors to record and document decisions about and for the individual participant throughout their participation in the PATH program. The ISS is used to justify decisions concerning the appropriate mix and sequence of services as well as documentation of barriers to successful completion and the methods to resolve those barriers.

In addition to documenting the ISS and case notes, the program design requires contractors to participate in tasks that include but are not limited to:

- Ensuring that all participants have an opportunity to complete CASAS testing.
- Maintaining attendance logs.
- Collection/verification of attendance records for PATH participants enrolled in training activities.
- Documenting employment interviews and the results of those interviews.
- Case noting counseling conferences and phone communications with participants.
- Researching and processing employment related support services that address participant barriers.
- Managing participant activities related to enrollment in employment, and termination on a timely basis.
- Assessing participants for education and work history.
- Conducting seminars identified in the curriculum as well as other Michigan Works! Career Center seminars.
- Participating in scheduled training sessions.

Retention of all required records for four years after contractors make final payments and all other pending matters are closed is required.

Hours of Operation

The PATH Program will operate five days per week. The site must be staffed from 8:00 am to 5:00 pm Monday through Friday. All PATH Program participants will be required to attend the site based on an individual schedule developed with their PATH case manager.

The M/SC Michigan Works! Career Centers are closed for the following State of Michigan Holidays:	
Veteran's Day	New Year's Day
General Election Day (even years)	Martin Luther King Jr. Day
Thanksgiving Day	Presidents Day
Day After Thanksgiving	Memorial Day
Christmas Eve	Juneteenth
Christmas Day	Independence Day
New Year's Eve	Labor Day

Staffing

To deliver quality services to participants, adequate staffing of PATH sites is required. Excluding support staff, it is preferred that all other staff members have a Career Development Facilitator credential. It is also preferred that staff have a minimum of a bachelor's degree in human services or a related field. Other staff should have education or specific experience related to their positions. An Administrator need not be on site but should be available to provide guidance and assistance when needed. Refer to the chart below for minimum staff levels. If a contractor believes additional staff is required, this must be reflected in the budget along with a detailed description of that proposed position.

Supervision	
1	Program Manager
1	Assistant Program Manager
Port Huron	
1	Team Lead
1	Support Staff
1	Business Services Professional
1	Training Specialist
3	Case Managers
Clinton Twp	
2	Team Leads
1	Support Staff
1	Business Services Professional
1	Training Specialist
1	Refugee Case Manager
6	Case Managers
Roseville	
2	Team Leads
1	Support Staff
1	Business Services Professional
1	Training Specialist
1	Refugee Case Manager

6	Case Managers
Total	
33 Staff	40hrs/week x 52 weeks x 33 staff **= 68,640 Total Staff Hours**

General Position Description (not limited to):

Program Manager/Assistant Program Manager – Responsible for oversight of program staff for PATH services. Responsibilities also include maintaining communication with the PATH Coordinator and PATH Specialist, reviewing program goals, and ensuring they are met, and intervening and investigating participant complaints.

Team Lead – Will not carry a participant caseload. Oversee the data entry and documentation of Case Managers caseloads. Attend all triage and hearing appointments with Department of Health and Human Services partners. Assist with the day-to-day questions and guidance related to policy and procedures.

Business Service Professional – Connection between PATH participants and the business community. Assist participants with intentional job search and preparation. Will be an active member of the greater agency Business Services Department. Develop new employment opportunities for PATH participants.

Case Manager – Perform a number of tasks related to case management, career planning and life planning. Assist participants in setting a personalized, comprehensive plan with action steps to meet training and employment goals.

The ideal PATH Staff person will have the following skills and abilities:

- Open minded and nonjudgemental.
- Able to advocate for, motivate, mentor, and engage participants.
- Ability to adapt to changes as services and environment dictates.
- Able to recognize and address resolutions to employment, educational, personal, and social barriers.
- Strong customer service focus for both participants and community partners.
- Knowledge of labor market trends.
- Knowledge of tools and methods for career exploration.
- Knowledge of assessment instruments with the ability to identify strengths and needs which will result in realistic occupational and academic goal setting.
- Able to complete, organize and maintain accurate participant records and data.
- Adhere to professional standards of participant confidentiality.
- Able to work collaboratively with other Michigan Works! contractors, community organizations, training institutions and employer partners.
- Will always represent the Michigan Works! system in a professional manner with the ability to market and promote job seekers and business services.

Equipment and Supplies
Participant and staff consumable supplies (paper, pencils, etc.) will be requested and approved on a monthly basis and should not be included in the proposed budget. Additionally, the following materials will be provided to the contractor for distribution to PATH participants to implement the program: All curriculum textbooks and materials, USB flash drive, daily planner, and vinyl portfolio for job search activities. These costs are not included as part of the proposed budget.

Monitoring/Performance Goals
Contractors are subject to federal and state audits. Additionally, the M/SCWDB will conduct annual fiscal monitoring. Monitoring will also take place through review of OSMIS reports of enrollment activities, outcomes, and case notes, as well as contractor monthly invoices.

Performance of the contractor will be evaluated monthly and will focus on Federal Work Participation Requirements where at a minimum 60% of all PATH participants are meeting required participation. It is further expected that a minimum of 15% of participants will enroll in a training activity and 45% of participants will become employed at least 20 hours per week.

Additional performance monitoring may include but is not limited to the following elements:

- Timely and accurate program participant attendance reporting.
- Development and documentation of on-going Individual Service Strategies.
- Entered employment, Job Retention, and Training Enrollment rates.
- Accurate completion of Federal and State verification forms.
- Delivery of required curriculum.

Limitations
The preliminary application does not commit the M/SCWDB to award a contract or to pay any costs incurred by the proposer in the preparation of the response submission. The M/SCWDB reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with all qualified sources, or to cancel this request of submission in part or in its entirety if it is in the best interest of the M/SCWDB to do so. The award of any contract based on proposals received in response to this request is contingent upon the receipt of adequate funding allocations.

The Workforce Development Board contracting Coordinator will require the bidders selected to participate in negotiations and to submit any price, technical or other revisions on their bids that may result from negotiations.

Eligible Bidders
The M/SCWDB will comply with all federal and state mandates governing the contractor selection. To be considered for funding, service providers must have and be ready to document:

1. Adequate financial resources or the ability to obtain them.
2. The ability to meet program design specifications at a reasonable cost.
3. The ability to meet performance goals.

4. A satisfactory record of past performance.
5. The ability to provide services that can lead to the achievement of program goals.
6. A satisfactory record of integrity, business ethics and fiscal accountability.
7. A satisfactory record of training retention, completions, and job placements.

Recommendations will be made to the Macomb/St. Clair Workforce Development Board full Board of Directors for final approval on **August 15, 2024**. Following approval from the full Board of Directors, the selected proposer will be invited to negotiate cost and contract terms.

Cost Reimbursement Contract

Services and activities conducted as a result of an award and successful term negotiations will be implemented on a cost reimbursement basis. The proposed budget should reflect a one-year period. If granted a contract extension for a second and/or third fiscal year, a review of expenditures and an opportunity to adjust specific line items, including staff wages, will occur at the completion of FY2025 and FY2026.

Administrative Costs are costs associated with performing general administrative functions such as accounting, budgeting, financial and cash management, procurement and purchasing functions, payroll, audit functions, general legal services functions, performing oversight and monitoring responsibilities, and travel costs incurred for official business in carrying out administrative activities or the overall management of the contract. It is preferred that administrative costs not exceed 6.5% of total budget but cannot exceed 10% of the total budget.
Direct program service costs refer to personnel who are directly related to providing services to participants. This includes salaries, wages, fringe benefits, equipment, supplies, staff training, other materials used by and for the participant, dissemination of information on program activities to employers, job placement services for participants, follow-up, retention, and mentoring services.

Note: State policy (Section 305 (s)) of Public Act 169 states that State welfare-to-work participants enrolled in training services including vocational training programs shall not be counted as “students” within a school district or ISD for the purpose of receiving per-pupil funding.

Profit and Program Income

Public and private non-profit entities will be required upon the completion of a contract to report their actual operational costs of the contract to the Macomb/St. Clair Workforce Development Board by line item. If the M/SCWDB has paid the public or private non-profit entity more than the actual operational costs, the entity must return all revenues in excess of costs to the M/SCWDB.

Further, a private-for-profit entity must identify profit (fees or other revenue in excess of actual costs) in their line-item budget. In accordance with federal mandates that require assurances that profit is reasonable and allowable, the M/SCWDB requires profit to be based on the net cost of the contract, **not to exceed 10%**.

Income earned by the service provider as a result of contracts entered into with the M/SCWDB is program income. Program income includes income for fees for services performed and from conferences, usage or rental fees, sale of commodities or fabricated items, interest earned on funds, and reimbursed awards for public or private non-profit entities that were in excess of actual costs incurred in providing services. Program income in excess of contract costs will be returned to the M/SCWDB.

Accounting Methods

Reference to the Federal Regulations Operations relating to the RFP will be held to the standards identified in Federal Register Office of Management and Budget Volume 78, No. 248, dated December 26, 2013, 2 CFR Chapter I and II, Part 200, et al.; Uniform Administrative Requirements, Cost Principles, and Audit Requirement for Federal Awards; Final Rule.

Federal Register :: Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards

This requirement is part of a contractual agreement to ensure the M/SCWDB meets federal regulation for reporting federal grants.

Invoicing for expenditures will include actual plus accrued expenses to be submitted monthly to the M/SCWDB with a final accounting to be made at the close of the contracting period. Invoices are expected to be submitted by the 10th of the following month to the M/SCWDB PATH Program Coordinator.

Procurement

There are specific uniform administrative requirements for the procurement of equipment, supplies, and/or services utilizing federal and state funding sources. Contractors must agree to follow the procurement policy outlined in **Attachment B**.

Grievance Policy

The M/SCWDB subscribes to the policy of equal opportunity and as such maintains a formal grievance procedure to handle complaints of participants and service deliverers. Adherence to same is acknowledged by acceptance of a contract from the M/SCWDB **(Attachment C)**.

Assurances and Certifications

The M/SCWDB and contractor assure and certify that all programs and activities funded under the PATH Program will comply with all equal opportunity and nondiscrimination laws, rules, and regulations.

TECHNICAL ASSISTANCE

The M/SCWDB welcomes questions about the RFP. Only written questions submitted by email will be accepted. Please submit questions to Sue Paternoster, PATH Coordinator: susan.paternoster@msc-mw.org with 'FY25 PATH Program Services RFP' in the email subject line. **The deadline to submit questions for technical assistance is 5:00PM EST, June 13, 2024**.

PROPOSERS CONFERENCE

Organizations interested in developing a PATH Program proposal are invited to attend a **Proposers Conference held on Monday, June 10, 2024, 10:00AM EST**. The Proposers Conference is an opportunity to ask the M/SCWDB questions pertaining to the RFP and proposal requirements. Location:

VerKuilen Building
21885 Dunham Road
Assembly Rooms A&B
Clinton Township, MI 48036
Parking near door E or F is recommended.

PROPOSAL REVIEW PROCESS

The proposer application is a preliminary mechanism used to determine the suitability of a proposer for funding. The review process involves:

Preliminary Screening: To be considered for funding the entire application must be completed in the format prescribed and received by the application deadline. Responses must be comprehensive. Based on the response, an evaluation team will determine whether further consideration of the application is warranted.

Fact Finding: Upon analysis of the application and budget, additional information may be requested. Clarification questions require a written response or presentation from the proposer.

Evaluation: Proposals will be scored and ranked according to the evaluation criteria.

Recommendation of Selection: Recommendations will be made to the full M/SCWDB Board of Directors for final approval. The selected proposer will receive notice and be invited to negotiate costs and contract terms.

Proposal Evaluation Criteria

Criteria		Maximum Points
Completion of RFP	Two printed copies and a flash drive of the proposal were submitted. Application is responsive and comprehensive in all areas.	5
Staff	To receive maximum points, all staff excluding support staff will have a minimum of a bachelor's degree in human services or related field and the total staffing levels must meet the requirements outlined in the instructions. The more specific the information provided (identifying specific personnel who will be assigned to the positions vs. job description), the more points the proposal will earn.	20
Cost/Price Analysis	Due to the prescriptive program design and the basis of the award to contractors is a competitive process, the M/SCWDB expects to fund programs which deliver the best quality of services at the most cost-effective price.	35
Program Design	Although Attachment A identifies the minimum curriculum topics for PATH programming, proposers will be evaluated on strategies and unique approaches they will incorporate into the minimum identified curriculum outlined.	20
Past Performance	Proposers who have managed a PATH Program for the M/SCWDB will be evaluated on achievement of goals identified on monthly PATH Performance Goals reports.	20
Total Points	The maximum points possible for those with past performance providing PATH services for the M/SCWDB is 100. The maximum points possible with no past performance providing PATH services for the M/SCWDB is 80. **Percentage of total points possible will determine the contract award.**	100 or 80

SUBMISSION REQUIREMENTS

For consideration, organizations must submit their proposal **no later than 12:00PM EST, Tuesday, July 16, 2024.** Proposals must be:

- Submitted in the legal name of the organization and signed by the individual with legal authority to enter into a contract.
- Submitted on the 'Application in Response' and with the required budget sheets.
- Two printed copies and a digital copy on a flash drive.
- Submitted in a sealed envelope labeled "Partnership. Accountability. Training. Hope. Program Services Bid."
- Proposals must be delivered in-person or by mail to:

Justin Al-Igoe, Executive Director
Macomb/St. Clair Workforce Development Board
VerKuilen Building
21885 Dunham Road, Suite #11
Clinton Township, MI 48036

The electronic date/time stamp recorded by the administrative staff at the M/SCWDB upon receipt of the proposal will indicate if a proposal was submitted on time. Proposals received prior to the due date will be time-stamped and secured until the scheduled bid opening time. Proposals received by the due date and time will be opened and recorded on Tuesday, July 16, 2024, at 1:00PM EST in the administrative office of the M/SCWDB.

Late proposals will be time-stamped but will not be opened and will not be considered for funding.

Release of Request for Proposals	May 31, 2024
Proposers Conference	June 10, 2024, 10:00AM
Closing of Question Period	June 13, 2024, 5:00PM
Proposal Due Date	July 16, 2024, 12:00PM
Award Announcement	August 15, 2024
Contract Period	October 1, 2024-September 30, 2025

PATH Curriculum

Orientation/Assessment/Barrier Resolution

Required Activity	Required Materials
PATH/AEP Orientation	Orientation Presentation Video, Daily Planner, Portfolio
Assessment	CASAS, Career Exploration Inventory
FAST Completion	*If not already completed*
Success Plan Conference	Success Plan Customer Survey
Training Specialist Discussion	Pure Michigan Talent Connect, Demand Occupation List
Barrier Resolution	Barriers to Employment Success Inventory, Barrier Resolution Questionnaire

Job Search Tools

Required Activities for Participants: These topics must be covered with every participant	
Documenting Participation	Resume Preparation
Job Search Techniques	Cover Letters
Outside Job Search Log Completion	Interviewing Skills
Job Applications	Thank You Letters
Pure Talent Connect Resume	Financial Literacy

Instruction of work readiness skills:

- Attendance
- Punctuality
- Workplace appearance
- Taking initiative
- Quality of work
- Teamwork and collaboration
- Problem solving
- Workplace policy and safety

Required Activity for Case Managers:	
Development and Maintenance of the ISS	Assignment of Direct Referrals
Weekly Progress Meetings	Utilize Community Service Opportunities
On-going Documentation of Participation	Follow-Up Success Plans

Seminars: These seminars are provided on a consistent schedule.	
Michigan Works! Career Center Seminars	
PATH Seminars (PowerPoint/Materials Provided):	
Plan for Success • Goal Setting • Time Management • Problem Solving	Let's Connect • Pure Michigan Talent Connect
The Hidden Rules of Job Hunting • Applications • Networking • Social Media	Professionalism in the Workplace • Self Esteem • Attitude • Communication Etiquette
	Turn Interview Questions into Job Offers • Interviewing • Dressing for Work

A private-public partnership administered locally by
the Macomb/St. Clair Workforce Development Board, Inc

PROCUREMENT POLICY & PROCEDURES

August 2022

The Macomb/St. Clair Workforce Development Board, Inc., the administrative entity for the Macomb/St. Clair MWA will be herein referred to as Macomb/St. Clair Workforce Development Board, Inc. or "The Board". The County of Macomb is considered the Grant Recipient. and as such, shall abide by its procurement guidelines. However, the MSCWDB shall adhere to more restrictive Department of **Labor and Economic Development-Workforce Development (LEO-WD)** guidelines as indicated in the following Policy Issuance and respective changes:

Policy Issuance (PI) No. 19-30, Change 1 (Dated October 8, 2021)
Policy Issuance (PI) No. 22-04 (Dated March 10, 2022)

References: Code of Federal Regulations (CFR), Title 2 – Grants and Agreements

CFR, Title 48 – Federal Acquisition Regulations System

Workforce Innovation and Opportunity Act (WIOA)

U.S. Department of Labor, Employment and Training Administration, One-Stop Comprehensive Financial Management Technical Assistance Guide

Rescissions: Policy Issuance (PI)

Background: This policy restates the uniform administrative requirements for the procurement of equipment, supplies, and/or services utilizing any OWD funding source. In addition, it clarifies the requirement for prior approval of the procurement of capital assets in excess of $150,000.

A. GENERAL LEO-WD PROVISIONS – Administrative

The MSCWDB the MWA does hereby adopt the following written procurement policy for all funding sources as determined by theDepartment of Labor and Economic Development-Workforce Development (LEO-WD) regarding the procurement and management of services, space, equipment and supplies. Macomb/St. Clair Workforce Development Board, Inc. shall conduct procurement procedures in such a manner that provides full and open competition.

The Michigan Department of Technology, Management and Budget (DTMB) has agreed to accept for state agencies the competitive bid process undertaken by partner agencies at the Michigan Works! Service Center, for the same goods and services, as satisfying the competitive bid requirements for purchasing such items as space, furniture, and equipment for their use at a Michigan Works! Service Center.

The 2 CFR 200 competitive bid requirements are also met if state departments have undertaken a DMB competitive bid process for space, furniture, and equipment, and the terms of those contracts are extended to the MWAs. Thus, it would not be necessary for a Michigan Works! Service Center or its partners to undertake another competitive bid process for space, furniture, and equipment for Michigan Works! American Job Centers.

B. CAPITAL EXPENDITURES

The approval authority has been delegated to the state for all grants administered by LEO-WD. And, to the extent that state procedures for state organizations are sufficient to define the allowability of Employment & Training Administration (ETA) capital asset acquisition costs and do not inappropriately constrain non-state organizations, the state's policy can be applicable to non-state governmental sub grantees.

The DTMB Procedure delegates purchasing authority for procurements of equipment and or services up to $250,000 to state departments; that is the Simplified Acquisition Threshold. Per the above, LEO-WD delegates this authority to the MWAs. Although this authority rests in the MWA, all equipment procurements, regardless of cost, are only allowable costs if they are necessary and reasonable for proper and efficient performance and administration of the grant award. Procurements may not be divided into separate orders (transaction splitting) with the intent to stay within this delegated authority.

Procurement of equipment and capital improvements in excess of $250,000 are subject to approval by LEO-WD at:

Michigan Department of Labor and Economic Opportunity
Workforce Development
Victor Office Center
201 North Washington Square, 4th Floor
Lansing, Michigan 48913

The MWA's request for approval shall include at a minimum the following applicable information:

1. A discussion of how the proposed capital improvement or equipment will benefit the MWA's program(s).

2. The expected cost of the procurement with a cost or price analysis.

3. A copy of the technical specifications or other pertinent information given to prospective bidders that explains in sufficient detail what is being procured.

4. Bidders' list and how the solicitation will be publicized.

No procurement of equipment or capital improvements in excess of $250,000 can be made prior to the date of approval. Construction or Purchase of Facilities is prohibited under the grants administered by LEO-WD with limited exceptions.

C BASIC POLICY REQUIREMENTS (As specified by LEO-WD and agreed to by MWA)

At minimum, the procurement policy shall require:

1. Cost and/or price analysis for every procurement.

2. Written standards for all types of procurement.

3. Conduct that ensures full and open competition.

4. Methods for acquisition of equipment, building space, or related facilities, as well as the selection of service providers.

5. Provisions for leases and contracts.

6. Provisions which prohibit conflict of interest and discrimination.

7. Procedures for inventory, record keeping, and reporting to show history of each procurement.

8. Methods to ensure sub recipient compliance with the terms and conditions of contractor purchase orders and awards made to responsible sub recipients.

9. Review of proposed procurement to prevent unnecessary purchases.

10. Documentation of all procurements by the MWA and any sub recipient for all procurement regardless of dollar amount.
11. Consideration will be given to consolidating or breaking out procurements to obtain a more economical purchase.

D. STANDARDS (As specified by LEO-WD and agreed to more specifically within this Policy)

In order to ensure that unfair requirements are not placed on procurement procedures, the following situations that are considered restrictive of competition are to be avoided. For Macomb/St. Clair Workforce Development Board, Inc. MWA details of standards please reference content that follows.

I. *Macomb/St. Clair Workforce Development Board, Inc.CODE OF CONDUCT*

FOR WIOA and/or Welfare to Work Funds - Workforce Development Board Members or Youth Council Members must neither cast a vote on, nor participate in any decision-making capacity, on the provision of services by such member (or any organization which that member directly represents), nor on any matter which would provide any direct financial benefit to the member or a member of his immediate family. No MSCWDB council member, MWA official, employee, or agent, Grantee's or sub grantee's of Macomb or St. Clair counties shall:

A. Solicit or accept gratuities, favors, or anything of monetary value from suppliers or potential suppliers; the grantee and sub grantee may set rules where financial interest is not substantial or the gift is an unsolicited item of nominal intrinsic value

B. Participate in the selection or award of a procurement subject to this section where, to the individual's knowledge, any of the following has a financial or other substantive interest in any organization which may be considered for award:
   1. The council member, MWA official, employee, or agent.
   2. Any member of his or her immediate family.
   3. His or her business partner; or
   4. A person or organization which employs any of the above or with whom any of the above has an arrangement concerning prospective employment.

      Immediate family is defined as:
      Wife, husband, son, daughter, mother, father, brother, brother-in-law, sister, sister-in-law, son-in- law, daughter-in-law, mother-in-law, father-in-law, aunt, uncle, niece, nephew, grandparent, step- parent, and step-child.

C. The MSCWDB, in accordance with LEO-WD Policy Issuance No. 19-30, assures that all Conflicts of Interest will be avoided in the procurement and authorization of all goods and services.

D. ***Violation of Standards:*** If there is a material failure to comply with the WDB Code of Conduct, the WDB may take one or more of the following actions against the individual or entity that materially failed to comply, as appropriate in the circumstances:
   1. Temporarily withhold cash payments pending corrections of the violation or more severe enforcement action.
   2. Disallow all or part of the cost of the activity or action which is in violation of the standards.
   3. Withhold further awards to a service provider.
   4. Discipline a WDB employee as warranted.
   5. Require corrective action to remedy the violation; and
   6. Take such further action as the WDB believes appropriately based.

II. BASIC POLICY

The MSCWDB procurement shall avoid the following situations that are considered restrictive of competition:

A. Placing unreasonable requirements on firms or organizations in order to qualify to do business.

B. Requiring unnecessary experience and/or excessive bonding.

C. Noncompetitive pricing practices between firms or organizations or between affiliated companies or organizations.

D. Noncompetitive awards to consultants that are on retainer contracts.

E. Awards that would create organizational conflicts of interest.

F. Specifying brand name products instead of allowing a similar product of equal quality and describing the performance of other relevant requirements of the procurement.

G. Overly restrictive specifications; and

H. Any arbitrary action in the procurement process.

III. PROCUREMENT METHODS

A. **Micro-Purchase <$10,000**
This method of procurement used when the acquisition of services or supplies does not exceed $10,000 within a 12-month period. The amount is lowered to $2,000 when it the acquisition is for construction subject to the Davis-Bacon Act. *[2 CFR Part 200.320(a)]*

1. Purchases for Supportive Services
This method is appropriate for costs associated with federally funded programs. Cost must be necessary, reasonable, allowable, and allocable to the grant, including allocating the costs to the extent a benefit was received.

Individual grants have narrative plans and internal policies to describe allowable costs with program or locally determined limitations.

Specific examples of policies related to participant support services requests are as follows:
1. Workforce Development Board Policy Issuance 01-03
2. PATH Program Manual, Chapter 9

See MSCWDB Allowable Cost policy for further details.

2. Credit Card Purchases
This method of purchase pertains to any purchases made with the Macomb/St. Clair Workforce Development Board (MSCWDB) credit card, issued by County of Macomb. The credit card may be used for the following purposes (not all inclusive):

- On-line purchases of supplies/equipment
- Purchases for special projects
- Online/special supportive service purchases
- Postage
- Travel/Conference Reservations
- Meeting expenses

See MSCWDB Credit Card policy for further details.

B. **Small Purchase>$10,000 <$250,000**
Simple and informal procurement method when price is the overriding factor. Prices must be easily quoted and compared, delivery must be standardized, and the performance outcomes cannot dependent upon the content of goods and or services being procured. *[2 CFR 200.320(b)]*

This method requires a minimum of three quotes from a minimum of three qualified sources. For the quotes to be qualified they must be dated and current for the purchase being made. Price quotes must also be viable, in that the Entity must be able to purchase the item for the quoted price.

C. **Sealed Bids**
Publicly solicited, and a firm fixed price contract is awarded to the lowest priced bidder meeting all the conditions of the invitation to bid. This can be for a lump sum or per unit price contract. Prior to initiating a sealed bid an independent cost estimate must be conducted. When conducting a sealed bid an Invitation for Bid (IFB) will be publicly advertised as well as solicited from known suppliers. The IFB will include time, date, and location at which the bid will be opened. Adequate time will be allotted to advertise/solicit bids prior to the date set for a public bid opening. The Invitation for Bid needs to clearly define all items and or services that are listed within the bid request in order to allow bidders to accurately respond. The IFB must also include a firm fixed price contract amount by either lump sum or unit price. The bid will be awarded to the entity that has the lowest priced bid and meets all terms and conditions outlined in bid requirements. *[2 CFR Part 200.320(c)]*

There needs to be a minimum of two bidders that are willing to compete for business, no limit to the number of potential bidders will be set. Bidders are not required to be present at the bid opening to be awarded the bid.

Any or all bids may be rejected but there must be a sound documented reason for the rejection.

D. **Competitive Proposals**
Competitive procurement is used when there is more than one source bidding and the procurement of property or services over $250,000 in the aggregate. The lowest price is not necessarily the determining factor for selecting the proposal. Factors such as experience, outcomes, and/or program design are some possible evaluation criteria. Prior to proposal an independent price estimate must be conducted. When conducting a competitive proposal, a Request for Proposal will be publicized. Publication will include all specifications being requested to ensure that bidders can grasp the scope of the proposed goods and or services. It is required that Bidders are made aware of how each section of the RFP will be evaluated and how each section of the RFP is weighted in determining the winning bid. The bid agreement will be based on a fixed price or a cost reimbursement agreement. *[2 CFR Part 200.320(d)]*

MSCWDB will evaluate proposals based on price, technical and other factors. The WDB will also retain evaluation procedures used to evaluate the proposals. Documentation of price rates or quotes shall be attained from an adequate number of qualified sources.

MSCWDB shall not break down one purchase into several purchases merely to be able to use small purchase procedures.

Where appropriate, an analysis will be made of lease versus purchase alternatives, and any other analysis to determine the most economical approach towards the procurement in question. It is and has been the policy of MWA to not utilize lease provisions for equipment, goods and services and is avoided except where facilities require it.

E. **Noncompetitive Proposals**
This method is also known as sole source; a method where there may only be one source where the goods and or services may be procured. This method may only be used when it may not be practical using one of the other four procurement methods listed above. *[2 CFR Part 200.320(f)]*

Some examples of when this method is acceptable to use:

1. Item is only available from only one source *[2 CFR Part 200.320(f)(1)]*
2. Public emergency for the requirement will not permit a delay resulting from a competitive solicitation. *[2 CFR Part 200.320(f)(2)]*
    - Necessary for the imminent protection of public health
    - Emergency repairs to protect life or property
    - Unforeseen crisis requiring immediate procurement

3. The federal awarding agency or LEO-WD expressly authorizes noncompetitive proposals in response to a written request from the Entity *[2 CFR Part 200.320(f)(3)]*
4. After solicitation of multiple sources competition is determined inadequate. *[2 CFR Part 200.320(f)(4)]*
    - This usually occurs after a competitive process has been used and there are insufficient bidders available

This is considered a last resort option and should only be used when there is documented reason for sole-source selection. Prior approval is required for all sole-source awards where the cost exceeds the LEO-WD simplified acquisition and Sealed Bids, or Competitive Proposals were not utilized. Approval requests need to include a description and or specifications of the items to be purchased, the independent cost estimate, purpose of the proposed purchase, cost and/or price analysis, an explanation on why another procurement method is not viable and supporting documentation as to how the purchase meets one of the conditions described above. Approval requests needs to be submitted to:

Michigan Department of Labor and Economic Development Opportunity
Workforce Development
Victor Office Center
201 North Washington Square, 4th Floor
Lansing, Michigan 48913

F. **Third-Party Procurement**
The Michigan Legislature has authorized the following two programs in which eligible grantees and sub grantees may utilize for procurement. Since these are State authorized contracts no additional bids would be required in order to justify the use.
1. **MiDEAL** – Authorized under Public Act 431 of 1984, Section 263, MiDEAL allows local units of government in Michigan to use stated procured contracts to buy goods and services (http://www.michigan.gov/localgov)
2. **REMC Association of Michigan** – Authorized under Public Act 451 of 1976, Section 380.671, the REMC Statewide $AVE (Schools Aggregated Volume in Education) Bid Project allows schools, colleges, public libraries, museums, State, County, and local government agencies to purchase a variety of supplies, equipment, software, computer and networking items through its list of approved vendors. (http://remcbids.org)

G. **Partner Organizations**
It is possible for two or more organizations to share responsibility for carrying out the main work of a grant. One organization must be classified as the “lead” organization while all of the rest will be co-grantees or co-sub grantees. However, each will be equally responsible for performance and financial obligations. Documentation must be present that clearly defines the roles and relationships these partner organizations will have.

H. **Requirements**
When comparing items to procure “Brand” naming is not allowed, unless there is a proprietary need, only features and specs can be listed as a requirement. There should be 2-3 comparable items pf different brands from different vendors. No single vendor can be used to provide like items, nor can the same item/model be used from different vendors. Each supporting comparable should be unique in regards to manufacture and vendor but should have same, or comparable, specifications.

IV. GENERAL PROCUREMENT - Local Operational Guidelines

A. Open competitive procurement practices seeking to obtain the most satisfactory product or service at the most reasonable cost shall be employed.

B. The MSCWDB shall ensure that an unfair requirement on procurement which restricts competition is avoided.

C. Only individuals authorized by the Executive Director shall procure any item for MSCWDB staff use.

D. The MSCWDB assures that all procurement shall be conducted in a manner which provides for open and free competition from independent vendors and the MSCWDB bidding processes.

E. Selection of a Vendor(s) is accomplished via accumulation of common line items purchase history for the prior years' period – the most common 24 items and then those items are shopped via 3 competitive vendors that must offer the following:

1. Possess secure electronic shopping portals available that
2. Provides Order/Invoice Tracking and History
3. Provides Purchase Terms of "Net 30 Days"
4. Prevents designated shoppers from actually making purchase decisions without full review and approval of the Board Purchasing/IT Manager.
5. The E-commerce security prevents a breach.

- It is important to note that the use of the Electronic Browser based Secure on-line shopping format has:
  - Reduced administrative support time to coordinate all offices needs that are spread across two counties.
  - Enabled a self-service availability with full review
  - Ability for local users have input and identify the needs of their office
  - Efficiency delivery - usually within 24 hours and include free inside delivery services
  - Has interest free credit line that allows for cross matched invoices to be delivered monthly to a central location for processing
  - Allows for emergency in-store purchases, using House Account, that can be procured at discounted rate which are agreed upon in the contract or in-store sale/clearance rate, if less costly.

Electronic Service Agreements with select vendor(s) in no way excludes the Procurement Manger or any other authorized by the Executive Director from using other competitive vendors. Competitive vendors are used when items/services may be acquired at a reasonable cost savings. This maximizes the competitive nature of procurement and resources available to staff and customers of the Macomb/St. Clair Workforce Development Board, Inc.

F. At minimum three bids shall be received from vendors prior to purchase. A Bid Summary Report (BSR), with cost analysis calculator, will be used to evaluate Bids. The BSR evaluates bids on price and quality and will be the major determining factor in vendor selection.

Vendors can be disqualified for any of the following (not all inclusive):

1. Failing to meet reasonable specification standards for equipment or which leave areas incomplete or ambiguous in their response
2. Providing inferior substitute specs of their own choosing that fail to meet equal standards laid out and could result in acquiring inferior/incomplete or substituted product
3. Removing cost such as shipping/handling/setups to undercut another vendor then making the removed cost a requirement after-market acquisition
4. Unapproved redesign of the Boards established specifications that tailors the Bid to the vendors' products or any advantage and or makes bid unable to be evaluated by BSR analysis calculator

During evaluation inference cannot be made on any vendors' bid. Any bid that does not clearly detail responses to align with board specification can be disqualified. Competitive bids need to be fair and equitable and allow the board to be assured that any equipment/services provided will meet quality standards.

G. Where a respondent Vendor in good faith may demonstrate to the Board that Specifications may require adjusting to ensure the receipt of anticipated quality/performance of equipment or services and the Board agrees the Bid shall be Modified. Subsequently the Bid is Modified and resubmitted to all respondents identifying any such shortfall or error of the original bid to keep the process equitable. The opportunity must be provided to all competing Vendors. Quality Specifications established by Procurement research and equipment result in kind to equal Acquisition of Quality Equipment and Services.

H Sole source shall be used when the award of a contract is unfeasible by sealed bids or competitive proposals. Non-competitive procurement can only be used under certain circumstances. Please see Part III. Procurement Methods – Section E.

The MSCWDB shall maintain documentation of non-competitive procurement and justification of same.

I. The procurement procedure within the MSCWDB is as follows:

1. Each MI Works Center and Macomb/St. Clair Workforce Development Board, Inc. designated Shoppers shall accumulate the identified expendable items required for the month and shall create a shopping cart via the Internet Vendor that is then submitted via email on the first Friday of each month (with the exception of July as the order date would fall on a Holiday) for review to avoid the purchase of unnecessary or duplicative items and approval by the Procurement/IT Officer.

2. The Procurement/IT Officer reviews items for errors and cost factors and either modifies and or edits as needed and then when correct and complete the order is released via Purchase Order with terms Net 30 days via Government (GSA Pricing) House Account with Vendor using Secure Socket Layer (SSL & EDI) Technology to ensure E-Commerce Security of the order.

3. Immediately upon order release approval the Vendor forwards the order to warehouse for process and shipping within 24 hours.

4. The Electronic Shopping system for MI Works Centers is intended to provide for small purchase expendable needs only. Shoppers are not permitted to order Computer Equipment / Hardware / Software or Furniture items. As all such items are procured by the Board and provided for use in the MI Works Centers it is the responsibility of those delivering services within said facilities to justify the need and expense to the Board and so that procurement standards are met and satisfied in the process and so that the Executive Director can determine whether available budget resources to acquire said equipment is available before any such authorization. MI Works subcontractors are not privy to these factors and as such must go through the Board's review and approval process to acquire such items. The Procurement/IT Officer maintains the Inventory database and Purchase records that identify Warranty Terms. If Shoppers were permitted to blindly order items, they could be ignoring the fact a warranty may exist and provide for a free replacement component or service.

   Any items reviewed from said Shoppers Cart may be removed prior to any order approval and the MI Works Center is informed they must have advance justification submitted to and approved by the Executive Director of the Board first. The Procurement Officer maintains a copy for future reference should the Executive Director authorize said procurement.

5. As equipment requests can take extensive research time to acquire competitive bids and timelines in many cases for delivery of such items can equal weeks or months from the point of ordering to delivery – Timelines are of utmost importance. Also - So as to maximize the Board's discounts to qualify for GSA pricing or other discounting it is unreasonable for MI Works Subcontractors to expect to make request for equipment items on a monthly basis like one would for an expendable item available off the shelf.

   Equipment needs must be evaluated at the beginning of each Program Year and then on a quarterly basis projecting future need for all centers/subcontractors and submit such requests cumulatively on a quarterly basis. To enable sufficient time to gather:

   - Complete and concise research,
   - Build quality specifications and
   - Solicit competitive pricing to maximize budget resources
   - Planning well in advance must be done by subcontractors with the Board.

6. Expectations of a procurement of non-expendable Equipment on a monthly basis is an unacceptable means to acquire said equipment as in many circumstances the item(s) may not be off the shelf consumer items and discounts availability may be tied to timelines that require a manufacture wait time – immediate warehouse availability for furniture and equipment typically comes at a loss of significant discounts. Proper planning and forecasting results in tremendous savings and can expedite procurements, one at a time equipment purchases are not cost effective

means to establish as a revolving recurring event as the time simply isn't available to permit such a practice.

Aside from a circumstance that warrants an Emergency Need (as defined by the Board per LEO-WD Guidelines) the timelines to ensure the development of quality specifications and maximized discount it shall be the goal of the Procurement Officer to produce a completed bid within 30 days following approval to Procure said equipment by the Executive Director.

The Equipment acquisition ETA on the Equipment follows that process. The 30 days is to allow for research, spec's building, invitation for quote, and solicitation of competitive resources and evaluation. The actual ETA for the equipment is decided upon the awarding of the Vendor Bid chosen unless conditions and timelines require expediency. Thirty days or sooner is the goal for Equipment Procurement Bid Process.

7. As numerous subcontractors deliver services in the MI Works Centers, they at times need to resolve needs jointly so as to prevent duplication or neglect of needs of one versus another. As the MI Works Center is a One Stop environment to provide services to the entire MI Works Customer base all local needs for equipment must be evaluated and considered as to ensure equity in the delivery of services and customer needs.

8. Again, ordering equipment and maximizing our price line discounts and the time involved to properly meet such needs is paramount and is not to be considered in the same manner as one would to acquire expendable supplies. Such requests must be submitted in writing with justification to the Executive Director quarterly to determine the availability and budget resources prior to Procurement/IT Officer developing a Bid Process and subsequent order of equipment.

   It must be understood that Procurement timelines can depend on tasks at-hand being serviced and other MANDATORY Services required by the Procurement/IT Officer as the network is always the First Priority to maintain the Network services for Board, Staff, and MI Works Customers. The Network needs take precedence.

9. Nor do the Shoppers order Equipment replacements. Instead, the Procurement/IT Officer must review the warranty status of said equipment from the inventory database to determine whether warranty replacement by the Manufacturer remains an alternative first via RMA Shipping/Replacement.

   Where the warranty may have expired for the item then it is the Procurement/IT Officer's responsibility to seek alternative resources available within the Boards inventory first and then if no resources exist to reallocate then a replacement item shall be procured via the competitive bid process and with the review and approval of the Executive Director using competitive processes.

10. Any emergency exceptions to this procedure are subject to approval by the Executive Director.

J. Procurement of items with a single unit cost of $250,000 or more shall only be entered into with a written contract in compliance with LEO-WD Policy Issuance No. 19-30.

K. The MSCWDB shall not procure items, pursuant to the following categories, without prior approval from LEO-WD:
   1. Audits.
   2. Capital improvements in excess of $250,000
   3. Equipment with a single unit cost in excess of $250,000.
   4. Management studies by outside agencies.
   5. Rent-purchase agreements.
   6. Option to purchase agreements.
   7. Sole source procurement in excess of $250,000.

L. Title to equipment with an acquisition cost of $5,000 or more is to be vested in the MWA or with the subcontractor as determined by the MWA. Vestment of title is contingent upon the MWA's operation of applicable programs. Title to equipment will transfer to LEO-WD upon the MWA's termination of applicable programs.

M. Property which is destroyed, disposed of, stolen or missing shall be reported to the MSCWDB's Procurement/IT Officer who shall record and report information in compliance with LEO-WD Policy Issuance No. 19-30.

Destroyed, Missing, or Stolen Equipment— The Macomb/St. Clair Workforce Development Board, Inc. MWA shall maintain documentation of all equipment destroyed. Documentation shall include date equipment was destroyed, a description of equipment and serial number(s), and the cause of loss.

MWAs shall contact their local police department and request a report to be completed on any missing or stolen equipment. A copy of the report shall be maintained by the grant recipient / administrative entity. For equipment, which originally cost $5,000 or more, a copy of the police report must be forwarded to LEO-WD. Inventory records shall be adjusted accordingly.

A settlement process is established whereby; it is established the Entity is responsible for the settlement of all contractual and administrative issues arising out of the procurements. These include, but are limited to, source evaluation, protests, disputes, and claims. Violations of law must be referred to appropriate local, State, or Federal agency having jurisdiction.

N. Protest procedures are included in RFP/IFQ process to handle and resolve disputes relating to both the award and administration of their contracts. Protest procedures have remedies and the information related to the protests and is required to be disclosed to the awarding agency.

O. Extra measures will be taken to ensure that Small, Minority, and Women owned business are attempted to overlooked and ruled out solely due to costs. The following affirmative steps will be taken to ensure that minority firms, women's business enterprises, and labor surplus area firms are used when possible:

1. Placing qualified small, minority and women's businesses on solicitation lists.
2. Ensuring that small, minority and women's businesses are solicited whenever they are potential sources.
3. Dividing total requirements when economically feasible into smaller tasks or quantities to permit maximum participation by small, minority and women's businesses.
4. Establishing delivery schedules, where the requirements permit, which encourage participation by small, minority and women's businesses.
5. Using the services and assistance of the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and
6. Requiring the prime contractor, if subcontracts are to be let, to take the same affirmative steps.

   (Example: Primary Expendables Vendor has contracts and accountability reports that report to MWA Quarterly procurements specifically targeted at these target group contractor suppliers plus Veterans and the Disabled-They receive Special consideration and are identified by shoppers via an assigned icon that represents this group during selection of these expendable goods and services.)

P. Cost or Price Analysis - A cost or price analysis will be performed for every procurement action, including contract modifications, except those which have no monetary impact.

Cost analysis is the review and evaluation, element by element, of an agency's proposal. Contract cost analysis is the element-by-element examination of costs and related information presented in the cost and pricing data offerors submit. Cost analysis will be used when the offeror is required to submit the elements of the estimated costs, or when adequate price competition is lacking. Cost analysis is also required for all sole source procurement.

Price analysis is the process of examining and evaluating a price without looking at individual cost elements. The focus is the "bottom-line" price. The method and degree of the analysis depends on the particular procurement and pricing situation. Price analysis will be used when price reasonableness can be established on the basis of the catalog or market price of a product or is based on prices set by law or regulation. At a minimum, the MSCWDB will make independent in-house estimates before receiving bids or proposals.

Q. A certification shall be submitted by the offeror to the MSCWDB stating that the cost data is accurate, complete, and current at the time of agreement, in all cases where a cost analysis is necessary and there is inadequate price competition. Awards or modifications negotiated in reliance on such data will provide the MSCWDB a right to a price adjustment to exclude any significant sum by which the price was increased in cases where the awardee had knowingly submitted data that was not accurate, complete, or current as certified.

R. Selection of Service Providers - The primary consideration in selecting agencies or organizations to deliver services will be the effectiveness of the agency or organization in delivering comparable or related services based on demonstrated performance, in terms of the likelihood of meeting performance goals, cost, quality or training, and characteristics of participants.

The selection of service providers will be made on a competitive basis to the extent practicable and will include a determination of the ability of the service provider to meet program design specifications established by the MSCWDB that consider the purposes and goals of the specific program. All procurement procedures within this policy apply to the selection of service providers.

S. Debarred and Suspended Parties - MSCWDB will not contract with any party which is debarred or suspended or is otherwise excluded from or ineligible for participation in federal assistance programs. Verification of procurements of $25,000 or more with Vendors and Bidders will be checked against the System for Award Management System (SAM) https://www.sam.gov

T. In compliance with Section 104 of PRWORA, the Charitable Choice provision, MWAs are to consider religious organizations on an equal, nondiscriminatory basis with the other groups when deciding to contract with private institutions for welfare services funded by TANF or Food Assistance programs.

V. SOLICITATIONS

A. Solicitations include clear and concise/accurate description of technical requirements for the goods or services to be procured. The Solicitation cannot contain features that restrict competition.

B. Board solicitations will include all the requirements the bidders must fulfill and all other factors to be used in the evaluating bids or proposals.

C. Solicitations will include a description, whenever practicable, of technical requirements in terms of functions to be performed or performance required, including the range of acceptable characteristics or minimum acceptable standards.

D. Solicitations will include specific features of “brand name or equal” descriptions that bidders are required to meet when such items are included in solicitations.

E. Solicitations will include the acceptance, the extent practicable and economically feasible, of products and services dimensioned in the metric system of measurement.

F. Solicitations will include preference, to extent practicable and economically feasible, for products and services that conserve natural resources and protect the environment and are energy efficient.

VI. LEASES / RENT

A. The MSCWDB shall have leases for all facilities rented for business use in excess of one year. Due to the unique nature, office & building leases do not qualify under micro purchase or small purchase methods without prior LEO WD approval. Each lease shall contain the following:

1. The agency organization name and business address of the lessee and the lesser.
2. The signatures of authorized representatives of both the lessee and the lesser.
3. The date of the signing of the agreement.
4. The effective dates of the agreement (beginning and ending dates).
5. Specific items covered by the agreement, i.e., address of the facility, quantity and description of equipment items, quantity and type of motor vehicles.

6. Specific maintenance and operating costs which are included or excluded.

7. Insurance costs.

8. Lease insurance for motor vehicles.

9. Conditions for termination of the lease without penalty costs should federal funds become unavailable.

10. Macomb/St. Clair Workforce Development Board, Inc. has had a policy of not procuring leases on equipment per long standing guidelines that prohibit the payment of accumulated interest.

B. The MSCWDB shall receive prior approval from the LEO-WD for lease-purchase and option to purchase agreements.

C. The MSCWDB shall ensure that facilities utilized for WIOA administration or programs comply with Section 502/504 of the Rehabilitation Act of 1973.

Leases are subject to all procurement standards and lease payments (i.e., rent) must be allowable under the applicable federal cost principles. Factors such as, location, parking, access to public transportation, maintenance, security, telecommunications, and other included services are normally considered when selecting office space or service center locations. Due to this unique and customizable nature, office and building leases typically do not qualify for procurement under the micro-purchase or small purchase methods without prior approval from WD.

A new lease must be procured when an existing lease expires, and all of its options have been exhausted. It cannot be renewed, extended, or otherwise amended without the support of an appropriate procurement process. For example: A three-year lease with the option of two, one-year extensions. If both option years are sequentially picked-up, the lease will need to be procured again in five years. In addition, a cost/price analysis (i.e., market analysis) for each option year entered into is needed to ensure that the rental costs are still competitive.

At a minimum, leases shall contain:

a. The agency or organization name and business address of the lessee and the lessor.

b. The signatures of authorized representatives of both the lessee and the lessor.

c. The effective dates of the agreement (beginning and ending dates).

d. Specific items covered by the agreement, i.e., address of the facility, quantity and description of equipment items, quantity and type of motor vehicles, specific maintenance, insurance, and operating costs which are included or excluded.

e. Conditions for termination of the lease without penalty costs or fees should federal funds become unavailable.

Rent must be reasonable in light of such factors as comparable property, market conditions in the area, alternatives available, as well as, type, life expectancy, condition, and value of the leased property. Rental arrangements should be reviewed periodically to determine if circumstances have changed and other options are available. In addition, if there is idle capacity or idle facilities, rent must be reassessed to ensure its allowability under federal programs. *[2 CFR Part 200.465(a) and .446]*
Use allowance is no longer identified by the federal regulations as an acceptable alternative to depreciation. The depreciation method must be followed when determining allowable rent charged to federal programs. *[2 CFR Part 200.436(a),(d)(5) and .443(b)(4)]*

The rental of any property owned by any individual or parties affiliated with the Entity, including commercial or residential real estate, for purposes such as home office workspace is unallowable. *[2 CFR Part 200.465(c)(6)]*

The amount of rent that can be charged to federal programs is further limited under “sale and lease back” arrangements, “less-than-arm’s-length” leases, and capital leases.

A. “Sale and Lease Back” Arrangements

Rental costs under ‘‘sale and lease back’’ arrangements are allowable only up to the amount that would be allowed had the non-Federal entity continued to own the property. This amount would include expenses such as depreciation, maintenance, taxes, and insurance. *[2 CFR Part 200.436 and .465(b)]*

B. Less-Than-Arm’s-Length Leases

As with “sale and lease back” arrangements, rental costs under ‘‘less-than-arm’s-length’’ leases are allowable only up to the amount that would be allowed had the non-Federal entity continued to own the property. This amount would include expenses such as depreciation, maintenance, taxes, and insurance. *[2 CFR Part 200.436 and .465(c)]*

A ‘‘less-than-arm’s-length’’ lease is one under which one party to the lease agreement is able to control or substantially influence the actions of the other. Such leases include, but are not limited to those between:

1. Divisions of the Entity. *[2 CFR Part 200.436 and .465(c)(1)]*

2. The Entity under common control through common officers, directors, or members. *[2 CFR Part 200.436 and .465(c)(2)]*

3. The Entity and a director, trustee, officer, or key employee of the Entity or an immediate family member, either directly or through corporations, trusts, or similar arrangements in which they hold a controlling interest. For example, the Entity may establish a separate corporation for the sole purpose of owning property and leasing it back to the Entity. *[2 CFR Part 200.436 and .465(c)(3)]*

4. Family members include one party with any of the following relationships to another party: *[2 CFR Part 200.436 and .465(c)(4)]*

   i. Spouse, and parents thereof;

   ii. Children, and spouses thereof;

   iii. Parents, and spouses thereof;

   iv. Siblings, and spouses thereof;

   v. Grandparents and grandchildren, and spouses thereof;

   vi. Domestic partner and parents thereof, including domestic partners of any individual in 2 through 5 (ii-v) of this definition; and

   vii. Any individual related by blood or affinity whose close association with the employee is the equivalent of a family relationship.

C. Capital Leases

Rental costs for leases that are required to be treated as capital leases under Generally Accepted Accounting Principles (GAAP) are allowable only up to the amount that would have been allowed had the Entity purchased the property on the date the lease agreement was executed. This amount would include expenses such as depreciation, maintenance, taxes, and insurance. The provisions of GAAP must be used to determine whether a lease is a capital lease. Interest costs related to capital leases are allowable to the extent they meet the criteria in 2 CFR Part 200.449. Unallowable costs include amounts paid for profit, management fees, and taxes that would not have been incurred had the non-Federal entity purchased the property. *[2 CFR Part 200.436, .449, and .465(c)(5)]*

With limited exceptions, capital leases for land, buildings, and other real property are prohibited under federal programs administered by WD. If permitted under the federal program, prior WD approval is required.

VII. CAPITAL IMPROVEMENTS

The MSCWDB will seek approval from LEO-WD for capital improvements of $250,000 or more.

VIII. SERVICES

A. Prior approval shall be received from LEO-WD prior to entering into an agreement for management studies from outside agencies.

B. In the lease of motor vehicles, insurance shall be maintained that ensures appropriate parties are held harmless against claims arising from the maintenance or use of such motor vehicles. Insurance shall be through a commercial insurance policy and cover bodily injury and property damage. A minimum coverage of $100,000 per person and $300,000 per accident for bodily injury, and $25,000 per accident for property damage is required.

IX. EQUIPMENT

A. Open competition practice of purchasing shall be utilized unless an item meets and requires use of the sole source criteria.

B. Prior approval from LEO-WD is not necessary on the purchase of equipment of less than $250,000 per unit item. The title of equipment is vested in MWA.

C. MSCWDB will seek approval from LEO-WD prior to purchasing equipment at a unit cost of $250,000 or more.

D. The MSCWDB shall abide by the destroyed, missing, or stolen equipment policies as indicated in LEO-WD Policy Issuance No. 19-30.

X. PURCHASE OF GOODS AND SERVICES

A. Procurement/IT Officer or other Board Administrative Staff authorized by the Executive Director as (Purchasers) shall complete the Bid Summary Form. Completion of form and conditions and workflow in its use is as follows:

1. Include the goods/services to be purchased, i.e., printing forms for intake, fax machine for the Resource Room, etc.
2. Include rationale for purchase, i.e., providing documentation necessary for intake eligibility, to receive information from other centers in a quick, efficient manner such as resumes, job orders, etc.
3. Include the names of each bidder with their quotation. Also attach original copies of responses to the bid and all support documents.
4. Provide Cost/Price Analysis and any pre-bid In-House estimates.
5. Indicate the bidder recommended to secure goods/ services.
6. Indicate the rationale for selection, i.e., lowest bid, able to meet timeframes, etc.
7. Bid Summary “Purchasers” will sign, indicate department and date.
8. The completed form, along with original bids, support documents would be submitted to the Executive Director for Review and approval.
9. Upon approval, the package would be returned to the “Purchasers” for notice of approval, activate order processing, copying for Procurement Database Entry.
10. Executive Director authorizes payment and coordinates the identification of appropriate

Designated Budget Source Funds based upon the use of said equipment with the Fiscal Department Supervisor.

11. The recipient of the Approved Bid Summary then awaits delivery of Goods and Services to be complete thereby meeting the terms of the Bid Summary prior to any financial reimbursement. Once all conditions are met the next step is carried out.
12. Upon receipt of invoicing from Vendor the Purchaser forwards the completed Bid Summary along with all support documentation with invoices of the approved package to the fiscal department with the Vendors FED Tax ID Number for processing by Fiscal Department.
13. Fiscal department establishes new account (if new vendor) processes paperwork to cut checks to the approved Vendors in the amount of submitted invoices.
14. Fiscal Department must follow-up and identify to the Procurement Officer the decided "Designated Funding Source" so the annual inventory including identification of expenditures by grant FAIN and reported to LEO-WD can be updated in its reporting requirements.
15. When vouchers are approved, they are returned to the fiscal department.
16. When checks are ready to be sent, fiscal department staff separates bid package, fills in voucher number on the bid summary form, and sets up a file for the package
17. Fiscal Department Completed Bid packages shall be kept in one location by program year to ensure easy access.
18. Completed bid packages are maintained for Fiscal Review within the Fiscal Dept.

XI. OPERATIONAL EQUIPMENT MANAGEMENT

A. The Procurement Inventory shall be maintained on computer (FileMaker Pro 11.0 Advanced Database-Procurement/IT Officer) and ledger systems (Fiscal Dept.-). Through these systems, the MSCWDB shall be able to provide information upon request regarding the equipment's:

1. Description of Equipment - Make and model.
2. Serial number
3. Tag number
4. Funding source(s) of equipment; including grant FAIN
5. Vestment of title (federal, MWA grant recipient)
6. Acquisition date
7. Unit acquisition cost
8. Percentage of federal funds used in acquisition
9. Location of Equipment
10. Condition of equipment
11. Program utilizing the equipment
12. Approval Date for Disposal
13. Disposal Date
14. Net Sales proceeds (if disposed of)

B. TAGGING PROCEDURES: Inventory controls will be maintained on any equipment which has a unit acquisition cost of $500 or more.

1. For any Equipment/Services procured independent of the Procurement/IT Officer with the authorization of the Executive Director such individual is responsible for meeting the same standards/conditions required in Section IX herein. As such the Procurement/IT Officer cannot be expected to take responsibility for satisfying the conditions in Section IX nor will a sign off occur where the Purchasing/IT Officer was not directly involved in the Procurement.
2. However, upon the completion and meeting all terms within Section IX it is the responsibility of Purchaser to provide all required information in Section X, subsection A so as to enable recording onto the Inventory Database and the development of tagging materials, otherwise there are no

means for the Procurement/IT Officer to know the item exists and no other Inventory Database is maintained by the Board.

New Equipment: When new equipment is delivered to a specific location, i.e., administrative office, MI Works Customer Service center, etc., The Procurement Officer develops property identification tags to reference an assigned unique ID number along with the serial number of the item that is cross indexed with the Inventory Database for history and tracking purposes for service, support, use, warranty, age, condition, depreciation, disposition, and reporting.

C. Equipment owned by the Federal Government shall be identified to indicate Federal Ownership in electronic records database records and reporting.

D. Adequate maintenance procedures shall be implemented to keep the equipment in good condition.

E. Where the Board is authorized or required to sell the equipment, proper sales procedures shall be established which provide for competition to the extent practicable and result in the highest possible return.

Responsibilities of the Procurement/IT Officer:

1. Ensure that MI Works Centers who are about to receive equipment have appropriate notice and that they likewise inform Procurement upon receipt so tagging can be arranged from Invoices received that identify the serial number and unit acquisition costs and unit acquisition dates logged into the database.
2. Tagging cannot be done in advance in most cases since upon receipt you do not receive an invoice. Invoices follow delivery in most cases separate from the delivery process and a shipping receipt has no serial numbers or pricing factors provided most of the time. They cannot be joined when they are separate events.
3. At the point where the Invoices are received and prior to payment to vendor that identify all required data entry items for the Inventory Database then the database records are created and at the same time a property tag is generated reflecting the Tag and Serial Numbers.
4. In most situations physical tagging will be delegated to the IT Technical Assistant.
5. Inventory ledgers of procurements and copies of invoices are to be maintained in a file located in the fiscal department.

F. PROCEDURES FOR MOVING EQUIPMENT:

1. Moving equipment from its designated area must be planned in advance and approved by the Executive Director with Caveats when it comes to IT related equipment.
    - Must also be reviewed by Procurement/IT Officer beforehand to allow proper planning - as the movement of Technical related equipment and services can have an adverse impact on the users of said equipment and render the tool where it cannot be used temporarily. IT related equipment is not always plug and play like a standard electronics item, network settings for the Domain and Servers and user info that is targeted through the Active Directory of our Network requires those factors to be considered before moving such equipment as network equipment settings. May require modification to enable continuation of services.
2. When approved the Procurement/IT Officer will update the inventory database file with the updated location specifics.
3. The actual physical relocation of all equipment is not necessarily the responsibility of Procurement/IT Services and where a review of the equipment move does not indicate it requires a technician local staff may be asked to relocate their own equipment physically where it does not require Technical Network expertise to do so.

G. PROCEDURES FOR DISPOSING OF EQUIPMENT:

Disposing of equipment from its designated area must be approved in advance by the Executive Director. The Subcontractor Supervisor Staff shall request disposal via email. It is the responsibility of

the Procurement/IT Officer to complete and update the appropriate information on the inventory database. The department supervisor is responsible to plan for equipment disposition were applicable.

Equipment will revert back to the Grant Recipient; equipment with a Fair Market Value (FMV) of $5,000 or more will not be disposed of without LEO-WD approval. Prior to disposal the Macomb/St. Clair Workforce Development Board, Inc. shall send the following information to LEO-WD:

1. Item description and condition
2. Tag number
3. Original cost and date of purchase
4. Date of transfer or sale
5. Name of agency or other entity receiving or purchasing items
6. Program for which the proceeds of the sale will be used

Equipment with a Fair Market Value (FMV) of less than $5,000 which is no longer needed may be sold for market value or be retained by the County of Macomb. If it is sold, proceeds will be reported as program income. Equipment which has been transferred from either Macomb or St. Clair Counties shall be maintained on the inventory with a cross-referenced tagging system but may not have unit acquisition cost and or original purchase date as these items may have been purchased by a sub-recipient.

H. In accordance with LEO-WD guidelines an equipment inventory will be performed at least once yearly by May 1st. This is delegated to the IT Technician who is Independent of the Procurement Process or other individuals authorized by the Executive Director that are also independent of the Procurement Department.

I. Inventory and general procurement procedures shall be periodically monitored by MSCWDB administration to assure compliance. Prior approval from LEO-WD is necessary if the MSCWDB disposes of equipment with a unit cost of $5,000 or more.

MI Works Customer Centers are monitored informally on a regular basis (weekly) as the IT Technician visits Centers and observes the equipment. Other high ticket equipment items like copy machines, color laser printers, fax machines are in full-service use and demand and immediate failure would be reported. If suddenly any one of these items were missing or stolen, they are so integral to services that they would result in immediate notice back to our office and the nature of the items themselves (size and weight) prevents theft.

J. The MSCWDB will abide by the destroyed, missing, or stolen equipment policies as indicated in LEO-WD Policy Issuance No. 19-30.

XII. PROPERTY MANAGEMENT ADMINISTRATIVE STANDARDS- Per LEO-WD Policy Issuance No. 19-30.

A. *Record Retention*—All pertinent property disposition records and supporting documentation shall be maintained for a period of three years. The retention period begins on the date of LEO-WD's acceptance of the final closeout report for the grant or contract. Records for nonexpendable property shall be retained for a period of three years after final disposition of the property. Records shall be retained beyond the three years if any litigation or audit is begun or if a claim is instituted involving the grant or agreement covered by the records. In these instances, the records shall be retained until the litigation, audit, or claim has been finally resolved.

B. *Property Maintenance*—Adequate maintenance procedures must be developed to keep the property in good condition. This includes securing pertinent warranties, following manufacturers recommended procedures for maintenance, and providing adequate care.

C. *Vestment of Title*—Title to equipment with an acquisition cost of $5,000 or more is to be vested in the MWA or with the subcontractor as determined by the MWA. Vestment of title is contingent upon the MWA's operation of applicable programs. Title to equipment will transfer to LEO-WD upon the MWA's termination of applicable programs.

D. *Inventory Requirements*—MWAs are responsible for the maintenance of the property inventory. The LEO-WD defines equipment as property with a per unit acquisition cost of $5,000 or more and having a life of one year or more. Property includes computer software acquisitions if the per unit acquisition cost is $5,000 or more.

E. *For purposes of inventory control,* maintenance of records by automatic data processing, ledger, or property card format shall be required for all equipment items purchased in whole or in part with funds from LEO-WD. Equipment inventory is to be physically verified annually by the MWA, by someone other than the Director or Property Manager. Equipment with an acquisition cost of $5,000 or more may not be moved outside the MWA's jurisdiction.

The annual inventory list shall include **all** of the following information:

1. Description of equipment
2. Serial number
3. I.D. or Tag number
4. Funding source(s) of equipment
5. Vestment of Title
6. Acquisition date
7. Cost
8. Percentage of federal funds used in the acquisition
9. Location of the equipment
10. Condition of the equipment
11. Program utilizing the equipment
12. Approval date for disposal
13. Disposal Date
14. Net sales proceeds (if disposed of)
15. Federal Award Identification Number (FAIN)

For all new purchases with a unit cost of $5,000 or more, the MWA shall add the items to their inventory list within 30 days of acquisition.

F. *Equipment Disposition*—Equipment purchased utilizing LEO-WD funding sources, which is no longer needed, must be disposed of at fair market value. Equipment may be traded-in or sold with the proceeds applied to offset the cost of replacement equipment. Equipment may be sold or otherwise disposed of (junked, donated, etc.) with the proceeds (if any) treated as program income and applied to offset program costs in the original funding sources. All equipment dispositions must be properly documented, and the information retained as required in Item 1.

G *Destroyed, Missing, or Stolen Equipment*—MWAs shall maintain documentation of all equipment destroyed. Documentation shall include date equipment was destroyed, a description of equipment and serial number(s), and the cause of loss. MWAs shall contact their local police department and request a report to be completed on any missing or stolen equipment. A copy of the report shall be maintained by the grant recipient/administrative entity. For equipment, which originally cost $5,000 or more, a copy of the police report must be forwarded to LEO-WD. Inventory records shall be adjusted accordingly.

XIII. DOCUMENTATION

Documentation must be maintained for each step in the procurement process to sufficiently detail the history of the procurement. This documentation includes, but is not limited to, the rationale for the method of procurement, independent estimates, cost/price analysis, solicitations, bids, proposals, justifications, profit, bidder lists, approvals, contracts, etc. *[2 CFR Part 200.318(i)]*

At a minimum, all procurement records must be retained for three years after final disposition of the item procured. If any litigation, audit, or claim is initiated involving the item procured during the three-year retention period, the procurement records must be retained until resolution of all issues and final action is taken or until the end of the three-year retention period; whichever is later. For example, the retention period for procurement documentation on a five-year lease starts at the end of the lease, not from the date the lease was procured. *[2 CFR Part 200.333]*

XIV. STANDARDS OF CONDUCT

A. Written standards of conduct that are in compliance with the federal and state regulations are required for employees engaged in the selection, award and administration of contracts. At a minimum, the written standards of conduct will be disseminated to all appropriate parties engaged in the selection, award and administration of contracts and shall address: *[2 CFR Part 200.318(c); WIOA Section 101(f) and 107(h)]*

1. No employee, officer or agent of the grantee or subgrantee (including, as applicable, state or local Workforce Development Board members) shall participate in the selection, award or administration of a contract supported by a federal award if he or she has a real or apparent conflict of interest. Such a conflict would arise when the employee, officer or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the stated parties, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract.

2. The grantee's or subgrantee's officers, employees and agents must neither solicit nor accept gratuities, favors or anything of monetary value from contractors, potential contractors, or parties to sub-agreements. The grantee and subgrantees may set minimum rules where the financial interest is not substantial, or the gift is an unsolicited item of nominal value.

3. Disciplinary actions to be applied for violations of such standards by officers, employees, or agents of the grantee and subgrantee.

4. If the Entity has a parent, affiliate, or subsidiary organization that is not a state, local government, or Indian tribe, it must also maintain written standards of conduct covering organizational conflicts of interest. Organizational conflicts of interest means that because of relationships with a parent company, affiliate, or subsidiary organization, the Entity is unable or appears to be unable to be impartial in conducting a procurement action involving a related organization.

XV. GENERAL PROCUREMENT STANDARDS

The Entity must use its own documented (i.e., written) procurement procedures which reflect applicable state and local laws and regulations, provided that the procurements conform to applicable federal law and the following standards: *[2 CFR Part 200.318(a)]*

A. Entities must maintain oversight to ensure that contractors perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders. *[2 CFR Part 200.318(b)]*

B. A review of proposed procurements to avoid purchase of unnecessary or duplicative items. *[2 CFR Part 200.318(d)]*

C. Consideration should be given to consolidating or breaking out procurements to obtain a more economical purchase. *[2 CFR Part 200.318(d)]*

D. Where appropriate, an analysis will be made of lease versus purchase alternatives, and any other analysis to determine the most economical approach. *[2 CFR Part 200.318(d)]*

E. To foster greater economy and efficiency, the Entity is encouraged to enter into state and local intergovernmental agreements or inter-entity agreements where appropriate for procurement or use of common or shared goods and services. *[2 CFR Part 200.318(e)]*

F. The Entity is encouraged to use federal or state excess and surplus property in lieu of purchasing new equipment and property whenever such use is feasible and reduces project costs. *[2 CFR Part 200.318(f)]*

G. The Entity is encouraged to use value engineering clauses in contracts for construction projects of sufficient size to offer reasonable opportunities for cost reductions. *[2 CFR Part 200.318(g)]*

H. A documented process to ensure that awards are made to only responsible contractors possessing the ability to perform successfully under the terms and conditions of a proposed procurement. Consideration will be given to such matters as contractor integrity, compliance with public policy, record of past performance, and financial and technical resources. *[2 CFR Part 200.318(h)]*

I. A documented process to maintain records sufficient to detail the significant history of all procurements. At a minimum, these records will include rationale for the method of procurement, selection of contract type, contractor selection or rejection criteria, and the basis for the contract price, including the independent estimate of price.
[2 CFR Part 200.318(i)]

J. The Entity may use time and material type contracts only after a determination that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk. *[2 CFR Part 200.318(j)]*

K. A documented settlement process. The Entity alone must be responsible, in accordance with good administrative practice and sound business judgment, for the settlement of all contractual and administrative issues arising out of procurements. These issues include, but are not limited to, source evaluation, protests, disputes, and claims. These standards do not relieve the Entity of any contractual responsibilities under its contracts. Violations of law will be referred to the local, state, or Federal authority having proper jurisdiction. *[2 CFR Part 200.318(k)]*

L. Compliance with the “Buy American Act” (41 U.S.C. 8301-8303). Only American-made equipment or products should be purchased with funds made available under WIOA Title I or II or under the Wagner-Peyser Act when in excess of the micro-purchase threshold (29 U.S.C. 49 et seq.). *[WIOA Section 502]*

XVI. COMPETITION

A. Full and Open Competition

All procurement transactions are to be conducted in a manner that willprovide full and open competition. Contractors that develop or draft specifications, requirements, statements of work, invitations for bids, or requests for proposals must be excluded from competing for such procurements. *[2 CFR Part 200.319(a)]*

The following are a few examples that would restrict competition.

1. Placing unreasonable or overly restrictive requirements on firms inorder for them to qualify to do business. *[2 CFR Part 200.319(a)(1)]*
2. Requiring unnecessary experience and excessive bonding. *[2 CFR Part 200.319(a)(2)]*
3. Noncompetitive pricing practices between firms or betweenaffiliated companies. *[2 CFR Part 200.319(a)(3)]*
4. Noncompetitive awards to consultants that are on retainercontracts. *[2 CFR Part 200.319(a)(4)]*
5. Awards that would create organizational conflicts of interest. *[2 CFR Part 200.319(a)(5)]*
6. Specifying only a “brand name” product instead of allowing “anequal” product to be offered and describing the performance ofother relevant requirements of the procurement. *[2 CFR Part 200.319(a)(6)]*
7. Any arbitrary action in the procurement process. *[2 CFR Part 200.319(a)(7)]*

B. State and Local Geographical Preferences

The Entity must conduct procurements in a manner that prohibits the use of statutorily or administratively imposed state or local geographical preferences in the evaluation of bids or proposals, except in those cases where applicable Federal statutes expressly mandate or encourage geographic preference. Nothing in this sectionpreempts state licensing laws. When contracting for architectural andengineering services, geographic location may be a selection criterion provided its application leaves an appropriate number of qualifiedfirms, given the nature and size of the project, to compete for the contract. *[2 CFR Part 200.319(b)]*

C. Solicitations

The Entity must have written procedures that ensures all solicitations:

1. Incorporate a clear and accurate description of the technical requirements for the material, product, or service to be procured. Such description must not, in competitive procurements, contain features which unduly restrict competition. The description may include a statement of the qualitative nature of the material, product or service to be procured and, when necessary, must set forth those minimum essential characteristics and standards to which it must conform if it is to satisfy its intended use. Detailed product specifications should be avoided if at all possible. When itis impractical or uneconomical to make a clear and accurate description of the technical requirements, a ‘‘brand name or equivalent’’ description may be used as a means to define the performance or other salient requirements of procurement. The specific features of the named brand which must be met by offersmust be clearly stated. *[2 CFR Part 200.319(c)(1)]*
2. Identify all requirements which the offerors must fulfill and all otherfactors to be used in evaluating bids or proposals.*[2 CFR Part 200.319(c)(2)]*

D. Prequalified Bidders List

The Entity must ensure that all prequalified lists of persons, firms, or products which are used in acquiring goods and services are current and include enough qualified sources to ensure maximum open and free competition. The Entity must also not preclude potential bidders from qualifying during the solicitation period. *[2 CFR Part 200.319(d)]*

XVII. SMALL AND MINORITY BUSINESSES

The Entity must take all necessary affirmative steps to assure that small and minority businesses, women's business enterprises, and labor surplus area firms are used when possible *[2 CFR Part 200.321(a)*

Affirmative steps must include:

A. Placing qualified small and minority businesses and women's business enterprises on solicitation lists. *[2 CFR Part 200.321(b)(1)]*
B. Assuring that small and minority businesses, and women's businessenterprises are solicited whenever they are potential sources. *[2 CFR Part 200.321(b)(2)]*
C. Dividing total requirements, when economically feasible, into smallertasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises. *[2 CFR Part 200.321(b)(3)]*
D. Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, andwomen's business enterprises. *[2 CFR Part 200.321(b)(4)]*
E. Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the MinorityBusiness Development Agency of the Department of Commerce. *[2 CFR Part 200.321(b)(5)]*
F. Requiring the prime contractor, if subcontracts are to be let, to takethese same affirmative steps. *[2 CFR Part 200.321(b)(6)]*

XVIII. RECOVERED MATERIALS

When the value of the item being purchased exceeds $10,000 (or the aggregate value in a fiscal year exceeds $10,000), entities are required toestablish an affirmative procurement program to procure items that contain the highest percentage practical of Environmental Protection Agency identified recovered materials. A satisfactory level of competitionmust be maintained. *[2 CFR 200.322]*

XIX. CONTRACT COST AND PRICE

A. The Entity must perform a cost or price analysis in connection with every procurement action in excess of the WD simplified acquisitionthreshold, including contract modifications. The method and degreeof analysis is dependent on the facts surrounding the particular procurement situation, but as a starting point, the Entity must make independent estimates before receiving bids or proposals. *[2 CFR Part 200.323(a)]*
    1. Cost Analysis – is the element-by-element review and evaluationof each item of cost and related information presented in the bidder's proposal. Cost analysis is necessary when the bidder is required to submit the elements of the estimated costs, or when adequate price competition is lacking.

       A certification should be submitted by the bidder stating that the cost data is accurate, complete, and current at the time of agreement. Awards or modifications negotiated in reliance on such data should provide a right to a price adjustment in cases where the awardee submitted data that was not accurate, complete, or current as certified. The price adjustment shall, at aminimum, exclude any significant sum by which the price was increased by the suspect data.

    2. Price Analysis – is the process of examining and evaluating a price without looking at individual elements of cost. The focus isthe "bottom-line" price. The method and degree of the analysis depends on the particular procurement and pricing situation. Price analysis shall be used when price reasonableness can be established on the basis of the catalog or market price of a product or is based on prices set by law or regulation.

B. Cost reimbursement is the preferred method of contracting and is theonly method allowable for contracts with state and local governments(e.g., cities, counties, school districts) when reimbursements are made in whole or in part with WIOA funding. *[WIA and WIOA Section 184(a)(3)(B)]*

C. Costs or prices based on estimated costs for contracts under the federal award are allowable only to the extent that costs incurred, orcost estimates included in negotiated prices would be allowable for the Entity under 2 CFR Part 200 Subpart E—Cost Principles. *[2 CFR Part 200.323(c)]*

D. Cost plus a percentage of cost contracts and percentage ofconstruction cost methods of contracting must not be used.*[2 CFR Part 200.323(d)]*

E. Under fixed-price and performance-based contracts, governmental and non-profit agencies must treat and report any revenue in excessof its actual costs as program income. Therefore, it is recommendedthat a provision is included in this type of contract that limits the recovery of costs to the lesser of actual costs incurred or the cumulative increments earned for less than full performance. *[2 CFR Part 200.307]*

XX. PROFIT

A. Profit is an allowable cost payable only to commercial organizations. The profit must be separately negotiated from the contract's price andcannot be based on a percentage of costs budgeted or expended in the agreement. Profit must be tied to performance and cannot be paid as a guaranteed fixed fee. Profit is only earned when performance outcomes are attained and can only be disbursed when those outcomes are validated. Profit cannot be paid in addition to performance payments or incentive payments. *[2 CFR Part 200.323(b); 48 CFR Part 15.404-4]*

B. Factors to consider when negotiating profit are the complexity of thework to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality ofits record of past performance, and industry profit rates in the surrounding geographical area for similar work. *[2 CFR Part 200.323(b);48 CFR Part 15.404-4(d)]*

C. Profit rates can be negotiated up to a maximum of ten percent. Profitrates can only be applied against the commercial organization's personnel-related costs (i.e., salaries, wages, and benefits) for the staff that contributed to the organization's unique capacity to manageand achieve the performance of the contract. *[48 CFR Part 15.404-4(c)(4)(i)]*

D. Under cost reimbursement contracts there is little to no risk to the commercial organization. Therefore, profit is usually not warranted.

XXI. DEBARMENT AND SUSPENSION

A. Entities must verify that procurements of $25,000 or more do not result in an award to any party which is debarred or suspended or isotherwise excluded from or ineligible for participation in federal assistance programs. *[2 CFR Part 180.220; 2 CFR Part 200.205(d)]*

B. Verification can be accomplished by: *[2 CFR Part 180.300]*

   a. Checking if the party is excluded. This is the preferred method asit does not rely on self-certification by the party. Excluded partiesare listed on the federal System for Award Management (SAM) website at www.sam.gov.

   b. Collecting a certification from the party. (See 48 CFR Part 52.209-5 for an example)

   c. Adding a clause to the contract or grant.

XXII. CONTRACT PROVISIONS

A. There must be sufficient language in the contract to protect the federalfunds and the interests of the Entity. Provisions should ensure compliance with all applicable federal, state, and local laws.

B. At a minimum, contract clauses must be sufficient to address thefollowing, as applicable to the contract: *[2 CFR Part 200.326]*

1. Contracts for more than the WD simplified acquisition threshold must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms and provide for such sanctions and penalties as appropriate.
   [2 CFR Part 200 Appendix II (A)]

2. All contracts in excess of $10,000 must address termination for cause and for convenience by the non-Federal entity including themanner by which it will be affected and the basis for settlement. *[2 CFR Part 200 Appendix II (B)]*

3. Equal Employment Opportunity. Except as otherwise providedunder 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3must include the equal opportunity clause provided under 41 CFR Part 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935,3 CFR Part, 1964-1965 Comp., p. 339), as amended by ExecutiveOrder 11375, "Amending Executive Order 11246 Relating to EqualEmployment Opportunity," and implementing regulations at 41 CFR Part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."*[2 CFR Part 200 Appendix II (C)]*

4. Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of $2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. [2 CFR Part 200 Appendix II (D)]

5. Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of $100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis ofa 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 toconstruction 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.
[2 CFR Part 200 Appendix II (E)]

6. Rights to Inventions Made Under a Contract or Agreement. If theFederal award meets the definition of "funding agreement" under 37 CFR Part 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 mustcomply 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. *[2 CFR Part 200 Appendix II (F)]*

7. 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 subgrants 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 theFederal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). *[2 CFR Part 200 Appendix II (G)]*

8. Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR Part 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 Part 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. [2 CFR Part 200 Appendix II (H)]

9. Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding $100,000 must file the required certification. Each tier certifies to the tier above that it willnot and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence anofficer 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 placein connection with obtaining any Federal award. Such disclosuresare forwarded from tier to tier, up to the non-Federal award. *[2 CFR Part 200 Appendix II (I)]*

10. A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the EPA at 40 CFR Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines. [2 CFR Part 200 Appendix II (J); 2 CFR Part 200.322]

11. Other requirements as defined by the federal awarding agency.These include provisions related to program and administrativeregulations, such as:

    i. Compliance with the "Buy American Act." None of the fundsmade available under WIOA Title I or II or under the Wagner-Peyser Act (29 U.S.C. 49 et seq.) may be expended by an entity unless the entity agrees that in expending the funds the entity will comply with Sections 8301 through 8303 of Title 41, United States Code (commonly known as the ''BuyAmerican Act''). *[WIOA Section 502]*

ii. The awardee agrees to comply with the required financial andcompliance audits in accordance with the Single Audit Act of 1984.

iii. Notice of awarding agency requirements and regulationspertaining to reporting

iv. Access by the grantee, the subgrantee, the Federal grantor agency, the Comptroller General of the United States, or any of their duly authorized representatives to any books, documents, papers, and records of the contractor which aredirectly pertinent to that specific contract for the purpose of making audit, examination, excerpts, and transcriptions.

v. Retention of all required records for three years after granteesor subgrantees make final payments and all other pending matters are closed.

vi. Salary and Bonus Limitations: Under Public Law 109-234 and Public Law 111-8, Section 111, none of the funds appropriated in Public Law 111-5 or prior Acts under the heading “Employment and Training” that are available for expenditure on or after June 15, 2006, shall be used by a recipient or sub-recipient of such funds to pay the salary and bonuses ofan individual, either as direct costs or indirect costs, at a ratein excess of Executive Level II. The salary and bonus limitation does not apply to vendors providing goods and services.

XXIII. CONTRACTS ADMINISTRATION

The Board Contract review and approval process ensures contractor conformance with the terms, conditions and specifications of the contract and ensures adequate and timely follow-up of all purchases.

Administered locally by the Macomb/St. Clair Workforce Development Board
VerKuilen Building
21885 Dunham Road, Suite 11
Clinton Township, MI 48036-1030

GRIEVANCE PROCEDURE

The Macomb/St. Clair Workforce Development Board maintains a formal grievance procedure to receive, investigate and resolve grievances and to conduct hearings in order to settle disputes arising out of programs with funding sources received from the Michigan Department of Labor and Economic Opportunity (LEO)..

Grievances can be brought by any individual or organization including, but not limited to, program participants, contractors, One-Stop partners, applicants seeking participation or financial assistance, labor unions and community-based organizations; or from administrative staff of the Macomb/St. Clair Workforce Development Board.

A grievance may be filed by an affected individual if a recipient of Temporary Assistance for Needy Families (TANF) is placed in a position (1) when any other individual is on layoff from the same or any substantially equivalent job, or (2) if the employer has terminated the employment of any regular employee or otherwise caused an involuntary reduction of its workforce in order to fill the vacancy so created with an adult receiving TANF assistance. In this situation, either party to the grievance, the TANF recipient, or the displaced employee, may appeal the decision rendered by the Administrative Entity of the Workforce Development Board to LEO.

A grievance may be filed by a regular employee displaced by a Workforce Innovation and Opportunity Act (WIOA) participant who is placed in an employment activity operated with WIOA funds. Also, a grievance may be filed by a WIOA participant in an employment activity if the participant is displaced.

Grievance procedures must provide WIOA participants a process, which allows an individual alleging a labor standards violation to submit the grievance to a binding arbitration procedure, if a collective bargaining agreement covering the parties to grievance so provides.

Where the alleged violation of the funding source or regulation is also an alleged violation of another law, regulation or agreement, nothing in this grievance procedure shall preclude an individual or an organization from filing a grievance under such other law or agreement with respect to the cause of action; as well as filing a grievance under the provisions herein.

In the case of participants who are receiving services under funding sources received from LEO, every individual prior to entering employment or training is informed of his/her rights and benefits in connection with same. Each participant receives a written grievance procedure including a notification of their right to file a grievance and how to do so. Every employer of training participants will notify their participants of the scope and availability of procedures for grievances relating to terms and conditions of employment. An employer grievance system shall provide for, upon request by the grievant, a review of an employer's decision by the Macomb/St. Clair Workforce Development Board.

The grievance procedure is available to any and all interested parties for review on the Macomb/St. Clair Workforce Development Board's website (www.msc-mw.org). In addition, the Macomb/St, Clair Workforce Development Board will provide copies of this Grievance Procedure to all interested parties affected by the local Workforce System including local One-Stop partners, service providers, and to all Employer-based training employers and participants. The One-Stop partners, service providers and employers receive a copy of the grievance procedure as part of their contracts and/or Memorandums of Understanding. Staff and of the administrative body as well as the staff of the service providers are provided with a copy at the time of hire. Members of the Board of Directors receive a copy at the time of joining the Board as part of their orientation. Job seeking customers receive a copy upon registration in the system. Copies are also posted in all of the Macomb/St. Clair Career Centers. All parties sign a document verifying receipt of the Grievance Procedure.

The identity of any person who has furnished information relating to, or assisting in, an investigation of a possible violation of the funding source shall be kept confidential to the extent possible, consistent with the fair determination of the issues.

INFORMAL

Step 1: Any individual having a grievance alleging a violation of Macomb/St. Clair Workforce Development Board funded programs, regulations, grants or other agreements, should first attempt to resolve the issue with his/her immediate supervisor or appropriate program coordinator. Training participants should discuss the matter at their training facility if the training site is the involved party. Participants involved in on-the-job training programs should first seek resolve with his/her employer.

FORMAL

Step 2: If resolution of the grievance is not accomplished at Step 1, the grievant should next attempt a resolution with the Complaint Coordinator for the Macomb/St. Clair Workforce Development Board. Contact (586) 469-5220; TTY 711, for the name of this person.

Step 3: If satisfactory disposition cannot be agreed upon at Step 2, a formal, written grievance can be filed with the Executive Director of the Macomb/St. Clair Workforce Development Board.

A. All grievances related to WIOA programs, Temporary Assistance for Needy Families (TANF), Food Assistance Employment & Training (FAE&T), Trade Act (except requests for redeterminations), and State of Michigan General Fund/ General Purpose (GF/GP) programs funded by LEO are required to be filed within one year of the date of the event that gave rise to the grievance.

B. All grievances shall be in writing and contain, to the extent practicable, the following information:
    1. The full name, address, and telephone number of the party/parties filing the grievance;
    2. The full name and address of the party against whom the grievance is made, or other information sufficient to identify the party against whom the grievance is made;
    3. A clear and concise statement of the facts, as alleged, including the pertinent dates, constituting the alleged violation;
    4. The provision of the act, regulations, grant, contract, or other agreements under the act believed to have been violated;
    5. The relief requested.

C. The grievance may be rejected by the Executive Director of the Macomb/St. Clair Workforce Development Board if it lacks merit, if it is determined that the grievant fails to state a grievable issue or there is no relief that can be granted, or if the grievant fails to

D. comply with this procedure. The Executive Director of the Macomb/St. Clair Workforce Development Board will inform the grievant in writing of the reason(s) the grievance was rejected. The notification will be issued as soon as possible or within 60 calendar days from the date the grievance was filed and will include the opportunity to appeal to LEO.

E. A hearing on a local level grievance shall be conducted within 30 calendar days from the date the grievance was filed, and a decision must be rendered no later than 60 calendar days from the date the grievance was filed. A hearing is not required at this step if the grievance is resolved without one or the grievant withdraws the grievance.
For WIOA-related grievances, Section 18(c) of the WIOA indicates that an opportunity for a hearing shall be provided to participants and other interested or affected parties.

If a hearing is to be conducted, the Executive Director of the Macomb/St. Clair Workforce Development Board must provide written notice to the grievant and party against whom the grievance is made. The notice shall include the date, time, and place of the hearing and an opportunity for the parties to present evidence, including witnesses. The notice of the hearing shall indicate the issues to be decided. Notice shall be given not less than **ten** calendar days prior to the scheduled hearing date.

F. At a minimum, the hearing process shall include:
1. A hearing officer,
2. An opportunity for each party to present witnesses and evidence.
3. An opportunity for each party to ask questions of all witnesses providing testimony at the hearing.
4. A record of the hearing and a list of all evidentiary exhibits presented at the hearing.
5. At the discretion of the hearing officer, there may be an opportunity to exchange evidentiary information prior to the hearing.

G. A written decision shall be issued by the hearing officer and shall include the following information:
1. Date, time and place of hearing (if held);
2. Name and address of the grievant;
3. Name and address of the party against whom the grievance is made;
4. Names and addresses of all witnesses called by the parties;
5. Information sufficient to identify all evidence presented;
6. A reiteration of the issues raised;
7. A determination of the facts;
8. An analysis of the issues as they relate to the facts; and
9. A decision addressing each issue.
10. A statement regarding the opportunity to appeal the decision to the WD.

H. If a response to the grievance is not received within the time prescribed, or should either party be dissatisfied with a decision, there is opportunity to submit an appeal to WD.

Step 4: **<u>Appeal to WD</u>**

A. A local level grievance decision may be appealed, in writing, to the Workforce Development. The appeal must be filed no later than ten (10) calendar days from receipt of an adverse local decision, or ten (10) calendar days from the date a decision was due but not issued.

B. All appeals shall contain, to the extent practicable, the following information:
1. The full name, address and telephone number of the party/parties filing the appeal;
2. The full name, address and telephone number (if any) of the party/parties against whom the grievance is made;
3. A clear and concise statement of the facts, as alleged, including the pertinent dates, constituting the alleged violation;
4. The provision of the act, regulations, grant, contract, or other agreements under the act believed to have been violated; and
5. The relief requested.

C. All appeals of a local level grievance decision shall be submitted by certified mail, return receipt request to:

Workforce Development
Executive Office
P.O. Box 30805
Lansing, Michigan 48909

D. Special Provisions

1. **Equal Opportunity**: Complaints alleging violation of the Nondiscrimination and Equal Opportunity (EO) provision of state/federal grant programs must be resolved in accordance with the nondiscrimination and EO policy guidelines issued by the local grant recipient in accordance with the policy guidelines set forth by the WD.

2. **Criminal Conduct**: Known or suspected fraud, abuse, or criminal conduct under the WIOA shall be reported in accordance with the incident report guidelines issued by the WD (PI 18-01).

3. **TANF Displacement**: Pursuant to the 45 CFR Part 261.70, a grievance may be filed by an affected individual if (1) a recipient of TANF is placed in a position when any other individual is on layoff from the same or any substantially equivalent job or (2) if the employer has terminated the employment of any regular employee or otherwise caused an involuntary reduction of its workforce in order to fill the vacancy so created with an adult receiving TANF assistance. In this situation, either party to the grievance, the TANF recipient, or the displaced employee, may appeal the local decision to the WD.

4. **WIOA Displacement:** A grievance may be filed by a regular employee displaced by a WIOA participant who is placed in an employment activity operated with WIOA funds. Also, a grievance may be filed by a WIOA participant in an employment activity if the participant is displaced.

5. **Binding Arbitration/Collective Bargaining:** Local grant recipient grievance procedures must provide WIOA participants a

process, which allows an individual alleging a labor standards violation to submit the grievance to a binding arbitration procedure, if a collective bargaining agreement covering the parties to the grievance so provides.

6. Jurisdiction: Depending on the nature of the grievance, TANF and FAE&T program applicant and recipient grievances shall be handled in accordance with the local grant recipient or the Michigan Department of Health and Human Services (DHHS) or other applicable procedures. For example, grievances regarding sanctioning or food stamp benefits will be handled by DHHS while grievances regarding programs administered by the local grant recipient will be handled by the local grant recipient.

7. Wagner-Peyser: Grievances involving Wagner-Peyser Act activities must be resolved in accordance with the grievance procedures outlined in the Employment Service Manual. In addition, please refer to the Employment Service Manual for specific guidance regarding work-related complaints that are not program specific, such as: employer hour and wage violations, migrant and seasonal farm worker complaints, and other possible violations of general labor laws.

Step 5: **State Level Review of a Local Level Decision**

The process WD will follow to handle appeals include:

Both parties should send all relevant information and documentation generated at the local hearing and related to this appeal to the address provided above (i.e. where the appeal was sent). It is the responsibility of the parties to ensure WD Executive Office has all relevant documentation necessary to make a determination on the grievance.

The appeal should be sent to WD Executive Office within 15 days of the filing of the appeal. The WD has the discretion to provide parties with the opportunity to provide additional information after the 15-day deadline if the WD believes it is necessary to make a final determination.

Rejection of the Appeal

A grievance may be rejected, and a final determination issued, if it is determined that it lacks merit, it fails to state a grievable issue, there is no relief that can be granted, or if the appellant fails to comply with the applicable procedures prescribed in the policy (e.g. the ten-day filing requirement among other provisions.)

Hearing

An opportunity for a hearing must be provided for a WIOA related appeal of a local level decision unless the appeal is rejected by WD, the parties agree to waive a hearing, or the appellant withdraws the appeal. If a hearing is to be held, it shall be conducted within 30 days of the receipt of the appeal.

A hearing is not required for an appeal of a non-WIOA related local level decision.

Hearing Notice

When a hearing is conducted on an appeal, the appellant and the respondent will be provided written notice of the date, time, and place of the scheduled hearing and of the opportunity to present evidence, including witnesses. The notice of the hearing shall indicate the issues to be decided. Notice shall be given not less than ten (10) days prior to the scheduled hearing date.

Hearing Process

At a minimum, the hearing process shall include a hearing officer, an opportunity for each party to present witnesses (subpoenas are not authorized under this policy issuance) and evidence, an opportunity for each party to ask questions of all witnesses providing testimony at the hearing and a record of the hearing and a list of all evidentiary exhibits presented at the hearing.

At the discretion of the hearing officer, there may be an opportunity to exchange evidentiary information prior to the hearing.

Final Decision

A written decision shall be issued not later than 60 days after the filing of the appeal. The decision shall include the following: If a hearing is held, the date, time, and place of the hearing. Name and address of the petitioner and respondent. If a hearing is held, the names and addresses of all witnesses called by the parties and the information sufficient to identify all evidence presented. Reiteration of the issues, a determination of the facts, an analysis of the issues as they relate to the facts and a decision addressing each issue.

A. **USDOL Review of a State Level Decision**

In general, a state level decision is final. However, if a decision is not issued by the due date, a WIOA related appeal may be reviewed by the Secretary of the United States Department of Labor (USDOL) if appealed within 60 days after the date the decision was due. A WIOA related decision may be appealed by the adversely affected party to the USDOL within 60 days of receipt WD decision. Pursuant to 20 CFR Part 683, an appeal must be submitted to the Secretary of the USDOL by certified mail, return receipt requested, to:

Secretary of Labor
U.S. Department of Labor
200 Constitution Ave., NW
C-2318
Washington, DC 20210

A copy of the appeal must be simultaneously provided to:

Regional Administrator
Employment and Training Administration
U.S. Department of Labor
230 South Dearborn Street, Room 628
Chicago, IL 60604

and

Workforce Development
Executive Office
P.O. Box 30805
Lansing, Michigan 48909

B. **Appeal Process for Local Grant Recipients**

Local grant recipients may appeal non-designation of local areas, monitoring findings, incident report findings, single audit resolution findings/issues, and other matters related to State Workforce Investment programs by filing an appeal with WD within 30 days of the adverse decision. Other interested parties cannot appeal directly to WD. To the extent that interested parties are affected by a WD decision regarding monitoring findings, incident report findings, single audit resolution findings/issues, etc., the interested parties must first file a grievance at the local level.

Appeals related to USDOL monitoring findings shall only be reviewed for compliance with USDOL requirements. A record shall be created to forward to USDOL, if applicable.

Appeals

All appeals shall contain, to the extent practical, the following information:

a. The full name, address, and telephone number of the appellant(s);
b. The full name, address, and telephone number (if any) of the respondent(s);
c. A clear and concise statement of the facts, as alleged including the pertinent dates, constituting the alleged violation;
d. The provision of the act, regulations, grant, contractor other agreements under the act believed to have been violated; and
e. The relief request.

Appeals shall be submitted to:

Workforce Development Executive Office
P.O. Box 30805
Lansing, MI 48909

Rejection of Appeal

An appeal may be rejected for any of the following reasons: It lacks merit, does not state a grievable issue, there is no relief that can be granted and/or the petitioner fails to comply with the procedures prescribed in this policy issuance.

Hearing

An opportunity for a hearing must be provided for a WIOA related appeal unless the appeal is rejected by WD, the parties agree to waive a hearing, or the appellant withdraws the appeal. If a hearing is to be held, it shall be conducted within 30 days of the receipt of the appeal.

A hearing is not required for an appeal of a non-WIOA related decision.

Hearing Notice

The parties will be provided written notice of the date, time, and place of the scheduled hearing date and of the opportunity to present evidence, including witnesses. The notice of the hearing shall indicate the issues to be decided. Notice shall be given not less than 10 days prior to the scheduled hearing date.

Hearing Process

The hearing process shall, at a minimum, include a hearing officer, an opportunity for each party to present witnesses (subpoenas are not authorized under this policy) and evidence, an opportunity for each party to ask questions of all witnesses providing testimony at the hearing, and a record of the hearing and a list of all evidentiary exhibits presented at the hearing.

At the discretion of the hearing officer, there may be an opportunity to exchange evidentiary information prior to the hearing.

Decision

A written decision shall be issued not later than sixty (60) days after the filing of the appeal. The decision shall include all of the following: If a hearing is held, the date, time, and place of the hearing. Name and address of the appellant and party against whom the appeal is made. If a hearing is held, the names and addresses of all witnesses called by the parties and information sufficient to identify all evidence presented. A reiteration of the issues, a determination of the facts, an analysis of the issues as they relate to the facts and a decision addressing each issue.

USDOL Appeal

The decision of WD is final. The local grant recipient may appeal noncompliant WIOA grievance procedures of WD to the Secretary of the U.S. Department of Labor (USDOL). An appeal must be submitted to the Secretary of the USDOL within sixty (60) days of receipt of the WD decision by certified mail, return receipt requested, to:

Secretary of Labor
U.S. Department of Labor
200 Constitution Ave., NW
C-2318
Washington, DC 20210

A copy of the appeal must be simultaneously provided to:

Regional Administrator
Employment and Training Administration
U.S. Department of Labor
230 South Dearborn Street, 6th Floor
Chicago, IL 60604

and

Workforce Development
Executive Office
P.O. Box 30805
Lansing, MI 48909

SPECIAL PROVISIONS

Grievances Alleging Discrimination

Macomb/St. Clair Workforce Development Board including all Macomb/St. Clair Workforce Development Board employees, all subcontractors and grantees, and sub-recipients thereof of funds administered by the Workforce Development Board will not discriminate against any employee, applicant for employment, or applicant for services provided by any LEO funds because of race, color, religion, sex (including but not limited to, pregnancy, childbirth and related medical conditions, transgender status and gender identity), national origin, (including limited English proficiency [LEP]) age, disability, or political affiliation or belief, or, height, weight, marital status, arrest without conviction, or other categories of groups protected by the law.

Grievances alleging violation of the nondiscrimination and equal opportunity (EO) provision of state/federal grant programs must be processed utilizing Macomb/St. Clair Michigan Works! "Discrimination Policy and Complaint Processing Procedures" which is in accordance with the CRC regulations.

Grievances Alleging Criminal Activity Related to the WIOA Program

Complaints of alleged fraud, abuse, or other criminal activity related to the WIOA program will be reported directly to the USDOL. The complaint will be filed using USDOL Form DL-156 (USDOL Incident Report.)

A copy of the DL-156 should also be submitted to both:

Regional Administrator
Employment and Training Administration
U.S. Department of Labor
230 South Dearborn Street, Room 628
Chicago, Illinois 60604

and

Office of Audit and Financial Compliance
Michigan Dept. of Labor & Economic Opportunity
Victor Office Building
201 N. Washington Square, 3rd Floor
Lansing, Michigan 48913

Macomb/St. Clair Workforce Development Board Anti-Harassment Policy

Macomb/St. Clair Workforce Development Board including all Macomb/St. Clair Workforce Development Board employees, all subcontractors and grantees, and sub-recipients thereof of funds administered by the Workforce Development Board, expressly prohibits and will take quick and decisive actions in response to any form of discrimination or harassment of any kind. For purposes of this policy, harassment is any verbal or physical conduct designed to threaten, intimidate or coerce an employee, co-worker or any person receiving Workforce Development Board funds.

The following examples are intended to be guidelines and are not exclusive when determining whether there has been a violation of this policy:

Verbal Harassment: This form of harassment includes comments that are offensive or unwelcome regarding a person's race, color, religion, sex (including but not limited to, pregnancy, childbirth and related medical conditions, transgender status and gender identity), national origin, (including limited English proficiency [LEP]) age, disability, or political affiliation or belief, or, height, weight, marital status, arrest without conviction, or other categories of groups protected by the law, including slurs, epithets and negative stereotyping.

Nonverbal Harassment: This form of harassment includes distribution, display or discussion of any written or graphic material, including the use of technology and social media, that ridicules, denigrates, insults, or shows hostility or disrespect toward an individual or group because of person's race, color, religion, sex (including but not limited to, pregnancy, childbirth and related medical conditions, transgender status and gender identity), national origin, (including limited English proficiency [LEP]) age, disability, or political affiliation or belief, or, height, weight, marital status, arrest without conviction, or other categories of groups protected by the law, including slurs, epithets and negative stereotyping.

Sexual Harassment: This form of harassment consists of unwelcome sexual advances, request for sexual favors, and other verbal requests of a sexual nature. These include persistent unwelcome requests for a date or lewd remarks or sounds, or physical conduct of a sexual nature including unwelcome touching or gesturing, or visual material including unwelcome exposure to sexual photos, cartoons or drawings.

Hostile Work Environment: This form of harassment is the use of unwelcome conduct of supervisors, co-workers, customers or anyone else the victim interacts with on the job, and the unwelcome conduct results in the workplace atmosphere as intimidating, hostile, or offensive.

Workplace Bullying: This form of harassment includes the use of inappropriately aggressive or insulting conduct or comments, which when viewed objectively, may cause a person against whom such conduct or comments are directed to be humiliated or intimidated.

Furthermore, Macomb/St. Clair Workforce Development Board is committed to protecting any individual who reports harassing conduct or otherwise participates in an investigation or review of such charges. An individual alleging retaliation can file a complaint with the EO officer utilizing the Macomb/St. Clair Michigan Works! "Discrimination Policy and Complaint Processing Procedures".

Interference with the ability of Macomb/St. Clair Workforce Development Board to carry out this policy will not be tolerated. All Macomb/St. Clair Workforce Development Board subcontractors and grantees, and sub-recipients thereof of funds administered by the Workforce Development Board are required to adopt and disseminate this anti-harassment policy.

Macomb/St. Clair Workforce Development Board Anti-Harassment Procedure

Any employee or customer, who believes he/she has been a victim of this policy, and, believes he/she has been subjected to harassment, shall report said incident either in writing or in person to their immediate supervisor or department head or the Executive Director of the Macomb/St. Clair Workforce Development Board.

- The person to whom the complaint is initially reported shall immediately conduct a preliminary investigation and report the

findings to the Executive Director of the Macomb/St. Clair Workforce Development Board.

- The Executive Director of the Workforce Development Board shall immediately investigate the complaint fully and completely.
- If the Executive Director of the Macomb/St. Clair Workforce Development Board shall conclude that improper conduct occurred, proper discipline will be imposed in accordance with appropriate Macomb/St. Clair Workforce Development Board practices and shall include all forms of discipline up to and including discharge of employee or removal of the service provider.
- A person against whom a complaint of discrimination or sexual harassment has been made shall be entitled to exercise any and all rights as may be provided by an applicable grievance procedure, the U.S. and State Constitution and Federal and State law.
- A copy of this policy will be distributed to each employee of the Macomb/St. Clair Michigan Works! system, all subcontractors and grantees, and sub-recipients thereof of funds administered by Macomb/St. Clair Workforce Development Board. Customers registered for services shall be provided a written copy of this policy. This policy is posted in the Labor Laws and Rights section of the public area in the Career Centers and is available to self-service customers electronically on Michigan Works! Macomb/St. Clair website at: www.msc-mw.org.
- Any persons having questions regarding the meaning, implementation or effect of this policy may direct inquiries regarding same to the Executive Director of Macomb/St. Clair Workforce Development Board.

False allegations can have a serious effect on innocent individuals. Macomb/St. Clair Workforce Development Board expects that all employees, subcontractors and grantees, and sub-recipients thereof of Workforce Development Board funds will act responsibly to establish an appropriate work environment.

APPLICATION IN RESPONSE TO
REQUEST FOR PROPOSALS TO DELIVER

PARTNERSHIP. ACCOUNTABILITY. TRAINING. HOPE. PROGRAM SERVICES (PATH)

Applications must be received no later than **12:00 PM on July 16, 2024**. The electronic date/time stamp recorded by the administrative staff at the Macomb/St. Clair Workforce Development Board upon receipt of the application will indicate if a proposal was submitted on time. The "Application in Response" to the M/SCWDB RFP for PATH Activities must be submitted as two printed copies plus an electronic copy on a flash drive.

If you are hand delivering your proposal it is recommended that you phone ahead to be sure a staff person is available to accept the proposal, 586-469-5220.

Applications submitted in a sealed envelope labeled "Partnership. Accountability. Training. Hope. (PATH) Program Services Bid" must be delivered by the above deadline to:

Justin Al-Igoe, Executive Director
Macomb/St. Clair Workforce Development Board
VerKuilen Building
21885 Dunham Road, Suite 11
Clinton Township, MI 48036-1030

The M/SCWDB is seeking competitive proposals for contractors to develop and implement Partnership. Accountability. Training. Hope. (PATH) services in Macomb and St. Clair counties. Actual PATH funding allocations have not been awarded and will be announced at a later date. The award of any contract based on proposals received in response to this request is contingent upon the receipt of adequate funding allocations.

This request for proposals does not commit the M/SCWDB to award a contract or to pay any costs incurred by the proposer in the preparation of the response submission. The M/SCWDB reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with all qualified sources, or to cancel this request for submission in part or in its entirety if it is in the best interest of the M/SCWDB to do so.

Small and minority businesses, and women's business enterprises are encouraged to apply.

APPLICATION IN RESPONSE TO
Macomb/St. Clair Workforce Development Board
REQUEST FOR PROPOSALS TO DELIVER
PARTNERSHIP. ACCOUNTABILITY. TRAINING. HOPE. PROGRAM SERVICES
(PATH)
Program Year 2025

Legal Name of Organization:	Click or tap here to enter text.
Street Address:	Click or tap here to enter text.
City:	Click or tap here to enter text.
State:	Click or tap here to enter text.
Zip:	Click or tap here to enter text.
Contact Representative:	Click or tap here to enter text.
Phone:	Click or tap here to enter text.
Email:	Click or tap here to enter text.
Proposing Under the Name of:	Click or tap here to enter text.
Federal Employer Identification Number:	Click or tap here to enter text.

☐ I understand that this Request for Proposal is to deliver PATH services in **both** Macomb and St. Clair County.

Type of Organization (check all that apply)
☐Assumed Name (Register No): Click or tap here to enter text.
☐Public Non-Profit
☐Public School District
☐Community College
☐Private for Profit
☐Partnership
☐Business Owned by an Individual with a Disability
☐Minority Owned Business
☐Corporation, incorporated under the laws of the State of: Click or tap here to enter text.

List all officers and stockholders:
Click or tap here to enter text.

Is any owner, partner, stockholder or employee of the company or institution completing this Request for Proposal associated with or have family members serving on the Macomb/St. Clair Workforce Development Board, Inc., or an administrative employee of the M/SCWDB?

☐ Yes ☐ No

If yes, name of individual and relationship:

Click or tap here to enter text.

PROPOSER'S SIGNATURE CERTIFICATIONS

I certify that this proposal is a firm offer to begin on October 1, 2024, through September 30, 2025, and that complete and accurate records justifying all expenditures, leaving a clear audit trail to point of origin will be maintained, subject to periodic audit by the Macomb/St. Clair Workforce Development Board, Inc., and/or the State of Michigan. I further certify that I have fully read and understand the specifications presented in this proposal.

NOTE: This document must be signed by the individual who has signatory authority for the organization under whose sponsorship this proposal has been submitted.

Authorized Signature:

Click or tap here to enter text.

Printed Name/Title:

Click or tap here to enter text.

Address:

Click or tap here to enter text.

If another individual is authorized to sign contracts as a result of this proposal, indicate:

Signature of Authorized Individual:

Click or tap here to enter text.

Printed Name/Title:

Click or tap here to enter text.

1. **Provide a description of the history of your organization and its mission**.
   Click or tap here to enter text.

2. **Provide a narrative description that cites evidence that your organization is qualified and capable of meeting expectations of the PATH initiative.**
   Click or tap here to enter text.

3. **Identify strategies your organization will implement to ensure performance goals outlined in Monitoring/Performance Goals section of the instructions are met.**
   Click or tap here to enter text.

4. **If your organization failed to meet performance goals under a current or previous contract with the M/SCWDB, explain new strategies your organization will take to ensure success in a new program year.**
   Click or tap here to enter text.

5. **Are you prepared to begin delivery of services on October 1, 2024, as defined under Period of Performance in the instructions?**
   Click or tap here to enter text.

6. **Are you prepared to deliver services to populations as defined under Populations to Be Served as described in the instructions? Include any experience or knowledge regarding providing services to Refugees.**
   Click or tap here to enter text.

7. **Are you prepared to deliver services as defined under the Required Level of Activity as described in the instructions?**
   Click or tap here to enter text.

8. **Describe unique supports not identified under the Equipment/Supplies section in the instructions that could be utilized to enhance participant engagement?**
   Click or tap here to enter text.

9. **Are you capable of performing the documentation tasks as outlined in Participant File/Maintenance required documentation for PATH participants section of the instructions?**
   Click or tap here to enter text.

10. **Discuss how you will maintain coverage of the PATH sites. Include any deviations from the Recognized Holiday Closing listed in the instructions.**
    Click or tap here to enter text.

11. **After review of the <u>Program Requirements/Program Design</u> section of the instructions, are you capable of providing the PATH model as outlined?**
    Click or tap here to enter text.

12. **Provide a narrative description of unique strategies and processes that your organization will use beyond the identified curriculum described in Attachment A.**
    Click or tap here to enter text.

13. **Describe the process for completing an objective assessment for the purpose of identifying appropriate services and career pathways for individuals.**
    Click or tap here to enter text.

14. **Describe the process for developing an Individual Service Strategy (ISS) and how it will be updated regularly as participant's needs change.**
    Click or tap here to enter text.

15. **Describe the retention strategies that will be implemented to increase the likelihood that PATH participants will actively participate and remain engaged in completing necessary activities.**
    Click or tap here to enter text.

16. **Describe how you will address basic skills deficiencies to assist participants in meeting their education and employment goals.**
    Click or tap here to enter text.

17. **Describe how you will encourage participants to enter vocational training activities that are suitable, in-demand and will lead to self-sufficiency.**
    Click or tap here to enter text.

18. **Provide a brief narrative of community organizations that will be partnered with to resolve participant barriers. Give examples of relationships your organization has with local community resources. Identify methods by which staff will be kept abreast of community-based resources**.
    Click or tap here to enter text.

19. **STAFFING**
    Complete a one-page summary that lists each required position <u>using the titles identified in the instructions</u> and the name of the staff person who will fill the position. If the staff is to be recruited, note "to be recruited" next to the position title.

    Attach résumés for each staff person that will be involved with the proposed project if a contract is awarded. Include the specific role they will play. Résumés should be up to date and include current positions. If staff has not been identified, provide a job posting

which includes staff title, a job description, qualifications, and credentials required that will be used to recruit qualified staff. Include résumés or job postings for each position.
Click or tap here to enter text.

20. **Complete the budget sheets (Refer to Attachment D)**
    Click or tap here to enter text.

21. **Does your organization have an official "Procurement Policy" that is followed when supplies and equipment are purchased?**
    Click or tap here to enter text.

    If yes, attach a copy of the policy.
    Click or tap here to enter text.

    If no, or if your organization's policy is less restrictive than the State of Michigan's procurement policy, are you willing to follow the procurement policy dictated by the M/SCWDB (Attachment B)?
    Click or tap here to enter text.

In accordance with the Office of Management and Budget (OMB) title 2 CFR Part 200.332, the M/SCWDB is responsible for evaluating its subrecipients for risk. Please respond to the following questions related to risk assessment.

1. **Has your organization received a federal grant (directly or indirectly) within the past five years?**
   ☐ Yes ☐ No
   If yes, when? Click or tap here to enter text.
   Description of grant: Click or tap here to enter text.

2. **Has your organization previously been required to submit to a compliance audit or Single Audit as required by OMB A-133, Title 2 CFR Part 200 or the cognizant agency?**
   ☐ Yes ☐ No
   If yes, attach the single audit.
   Was the award determined to be a major federal program in the audit?
   Click or tap here to enter text.

3. **Were there any findings resulting from the Single Audit?**
   ☐ Yes ☐ No

4. **Does the individual (or team of individuals) with primary responsibility for grant-related activities have prior experience with federal grants?**
   ☐ Yes ☐ No

If yes, describe. Click or tap here to enter text.

5. **Does your organization have written policies and procedures related to internal controls and oversight?**
   ☐ Yes ☐ No

6. **Has your organization had new or substantial changes to its operating structure/systems or has new personnel?**
   ☐ Yes ☐ No

Attachment D

PATH PROGRAM SERVICES

BUDGET SUMMARY

October 1, 2024 - September 30, 2025

Service Provider:	
Address:	

	Projected Costs
Total Administrative Cost	$0.00
Total Direct Program Services Cost	$0.00
Total this Proposal	$0.00
Proposed Profit	$0.00
Total this Proposal with Profit	$0.00

ADMINISTRATIVE COSTS

October 1, 2024 - September 30, 2025

Service Provider:			
ADMINISTRATIVE PROGRAM SERVICES			
SALARIES/WAGES			
POSITION/TITLE	HOURLY RATE	# OF HOURS	PROJECTED COST TO PROJECT
			$0.00
			$0.00
			$0.00
			$0.00
			$0.00
			$0.00
			$0.00
			$0.00
			$0.00
			$0.00
TOTAL SALARIES/WAGES			**$0.00**
FRINGE BENEFITS			
FICA			$0.00
MEDICAL			$0.00
RETIREMENT			$0.00
WORKERS COMP			$0.00
OTHER BENEFIT (description required)			$0.00
OTHER BENEFIT (description required)			$0.00
TOTAL FRINGE BENEFITS			**$0.00**
OTHER AMINISTRATIVE COSTS - Requires completion of detail sheets			
RENT			$0.00
UTILITIES			$0.00
EQUIPMENT			$0.00
SUPPLIES			$0.00
MILEAGE			$0.00
STAFF TRAINING / CONFERENCE			$0.00
OTHER			$0.00
TOTAL OTHER ADMINISTRATIVE COSTS			**$0.00**

GRAND TOTAL OF ADMINISTRATIVE COSTS **$0.00**

BUDGET DETAIL
OTHER ADMINISTRATIVE COSTS

RENT: Total square footage charged to project: _____

Rent fee per month: _____ X 12 months = _____

UTILITIES (specific):

ITEM		COST
Telephone Equipment		
Installation		
Monthly Charge	x 12 months =	
Electric Monthly	x 12 months =	
Gas Monthly	x 12 months =	
Other		

TOTAL UTILITIES: **$0.00**

EQUIPMENT:

	COST
Furniture	
Computer(s)	
Printer	
Fax	
Other:	

TOTAL EQUIPMENT: **$0.00**

SUPPLIES:

	COST
Software	
General Supplies	
Paper	
Other:	

TOTAL SUPPLIES: **$0.00**

BUDGET DETAIL
OTHER ADMINISTRATIVE COSTS CONTINUED

MILEAGE:

NUMBER OF MILES	CENT PER MILE	COST
	0.67	$0.00
	0.67	$0.00

TOTAL MILEAGE: $0.00

STAFF TRAINING / CONFERENCE:

	COST

TOTAL STAFF TRAINING/ CONFERENCES: $0.00

OTHER: Be specific in identifying "other" administrative costs**.**

	COST

OTHER: $0.00

DIRECT PROGRAM SERVICES COSTS

October 1, 2024 - September 30, 2025

Service Provider:				
DIRECT PROGRAM SERVICES				
SALARIES/WAGES				
POSITION/TITLE	LOCATION OF STAFF	HOURLY RATE	TOTAL HOURS	PROJECTED COST TO PROJECT
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
				$0.00
			TOTAL SALARIES/WAGES	**$0.00**

DIRECT PROGRAM SERVICES COSTS

October 1, 2024 - September 30, 2025

DIRECT PROGRAM SERVICES		
FRINGE BENEFITS		
FICA		$0.00
MEDICAL		$0.00
RETIREMENT		$0.00
WORKERS COMP		$0.00
OTHER BENEFIT (description required)		$0.00
OTHER BENEFIT (description required)		$0.00
OTHER BENEFIT (description required)		$0.00
TOTAL FRINGE BENEFITS		**$0.00**
OTHER DIRECT PROGRAM SERVICE COSTS - Requires completion of detail sheets		
SUPPLIES		$0.00
MILEAGE		$0.00
STAFF TRAINING / CONFERENCES		$0.00
OTHER		$0.00
TOTAL OTHER DIRECT PROGRAM SERVICE COSTS		**$0.00**

GRAND TOTAL OF DIRECT PROGRAM SERVICES COSTS **$0.00**

BUDGET DETAIL
OTHER DIRECT PROGRAM SERVICES COSTS

SUPPLIES:

	COST
Cell phones	
Other:	
Other:	
Other:	

TOTAL SUPPLIES: $0.00

MILEAGE:

NUMBER OF MILES	CENT PER MILE	COST
	0.67	
	0.67	

TOTAL MILEAGE: $0.00

STAFF TRAINING / CONFERENCE:

	COST

TOTAL STAFF TRAINING/ CONFERENCES: $0.00

OTHER: Be specific in identifying "other direct program services" costs

	COST

OTHER: $0.00