



Request For Qualifications

For

FISCAL & PROGRAMMATIC MONITORING

For The Period

July 1, 2019

to

June 30, 2020

RFQ #19-01-FPM

Date Issued: May 10, 2019

DEADLINE FOR SUBMISSION: May 31, 2019 AT 4:30 PM CDT

Responses should be directed to:

Michele Burns, Executive Director

CareerSource Okaloosa Walton

109 8th Ave

Shalimar, FL 32579

850-651-2315

INTRODUCTION

CareerSource Okaloosa Walton (CSOW), is seeking statements of qualifications from firms interested in providing independent fiscal and programmatic monitoring services for Program Year (PY) 2019-2020 (July 1, 2019-June 30, 2020). The monitoring services are to be provided at least four times from July 2019 through June 2020 for the preceding period. Please consider this document a formal request for qualifications (RFQ), responses to which will be used to determine the best qualified firm for these services and will be the basis for negotiating a contract. The contract may be extended for one (1) year at a time, up to four (4) additional consecutive years, if the performance of the provider so warrants. Renewal will be the option of the Board.

Okaloosa Walton Jobs and Education Partnership, Inc. d/b/a CareerSource Okaloosa Walton is a not-for-profit corporation organized under the laws of the State of Florida and has been determined exempt by the Internal Revenue Service under the provisions of IRS Code, Section 501(c)(3). We have been certified by the Governor as a Local Workforce Development Area for the purposes of implementing programs authorized by the federal Workforce Innovation and Opportunity Act (WIOA), Temporary Assistance for Needy Families (TANF), Wagner Peyser (WP) and related enabling legislation. Our principle function is the provision of, oversight of, and policy guidance to, the workforce development system in Okaloosa and Walton Counties.

CSOW operates and administers all programs directly. It is our primary responsibility to ensure that our organization adhere to government wide and program specific requirements set forth in the grant agreements through the use of effective monitoring resources.

SCOPE OF WORK

Because the purpose and objectives of the monitoring effort may differ from each sub-recipient, the extent and scope of monitoring services may vary. The final monitoring schedule and agreed upon procedures will be a negotiated part of the contract.

1. Administrative/Fiscal Monitoring

The scope of the administrative and fiscal monitoring includes tests, where appropriate, of whether CSOW and its sub-recipients, receive, disburse, safeguard and account for funds in compliance with the terms and conditions of the sub award, applicable federal, state statutes and regulations.

In addition to compliance testing in these areas, monitoring encompasses examination of CSOW's procedures and practices to determine the extent to which, in the monitor's opinion, such practices are efficient and effective.

2. Programmatic Monitoring

The scope of programmatic monitoring includes tests to determine whether CSOW are providing services and achieving effective outcomes in accordance with the terms and conditions of the sub-award, applicable federal and state statutes and regulations, and local policy and procedures in the following program areas: Welfare Transition (WT) Supplemental Nutrition Assistance Program Employment and Training (SNAP E&T), WIOA Adult, WIOA Youth, and Wagner Peyser, which includes Reemployment Services and Eligibility Assessment Program (RESEA), Military Family Employment Advocacy (MFEA) and the Jobs for Veterans State Grant (JVSG). Programmatic monitoring also includes tests of compliance with program regulations governing participant eligibility determination and documentation, service delivery, recordkeeping, data entry and case management.

In addition to compliance testing in these areas, monitoring encompasses examinations of procedures and practices to determine the extent to which, in the monitor's opinion, such practices are efficient and effective.

3. Staff Training and Technical Assistance

The firm selected and engaged as a result of this RFQ must be willing to provide selected CSOW staff technical assistance and training in monitoring concepts, procedures and techniques as part of its contracted services.

4. Work Product

The principle work product of the monitoring effort is a written report that details the results and opinions of the monitor with respect to the tests and examinations conducted.

QUALIFICATIONS

Should your firm be interested in providing these services, please include the following information in your response:

1. Cover letter that includes:

- a. Legal name of firm
- b. Address
- c. Name and title of firm owner, principal or managing partner
- d. Federal Employer Identification Number (FEIN)
- e. Dun and Bradstreet (D&B) number
- f. Organization type (Private for profit, non-profit or governmental corporation, sole proprietorship, community based organization, etc.)
- g. Phone/FAX number and email address/website of the firm
- h. Name of primary contact for the RFQ
- i. Phone/FAX number and email address of the primary contact

2. Firm's experience in providing monitoring services to workforce development boards:

- a. Provide a brief description of your firm.
- b. Describe the engagements your firm currently has in the workforce development industry. If partners or other employees serve in an advisory capacity, please list such positions.
- c. Indicate the levels of individuals who would be assigned to this engagement and explain how your firm will provide continuity of staff throughout the engagement.
- d. Describe your firm's basic approach to performing monitoring service and the resulting advantages which will accrue to our organization. You should identify how a monitoring engagement is planned and scheduled; the level of partner and manager commitment; quality control mechanisms; and other areas you feel are important.

3. Other Services Available:

Please indicate that your firm is willing and able to provide training and consultation services, as an element of a successfully negotiated contract for monitoring services, to CSOW staff in fiscal and programmatic monitoring concepts, procedures, and techniques.

4. Scope of Monitoring Services:

- a. State what effective methods you have used in similar engagements to monitor recipient activities.

- b. State what specific experience you have in monitoring engagements with federally funded organizations.

5. Fees:

- a. Provide information regarding your fee schedule for an engagement of this type, including the expected rate per hour of each staff. State whether out-of-pocket expenses are included in your fee schedule.
- b. Based on your understanding of the scope of the project described in the RFQ, please provide an estimate of the total number of staff hours required to complete the engagement.

6. References:

Please provide a listing of clients we may contact. Clients listed should be similar in nature to our organization and be serviced by the same staff who would be assigned to this engagement. Please include specific contact name and telephone number.

7. Other Information:

Please include any additional information not already requested that you consider essential to your response. If there is no additional information to include, please state, "There is no additional information we wish to present."

8. Submission Instructions:

Please submit (by U.S. mail, courier or hand delivery) one original and three copies of your response to this RFQ before noon CDT on May 31, 2019. Responses received after this date will not be considered for contract negotiation purposes. Please submit any questions about this RFQ or our organization in writing to Kelly Jordan at kjordan@careersourceow.com or at the address below.

Mailing address and physical location for delivery of response to RFQ is:

Michele Burns, Executive Director
CareerSource Okaloosa Walton
109 8th Ave
Shalimar, FL 32579