



# Request for Proposals

For the period of July 1, 2025-June 30, 2026  
With possibility for annual renewals

## **Adult Education Services**

### **For Allegheny County** **Employment Advancement & Retention Network (EARN)** **and Work Ready Programs**

**Proposals Due:**  
February 28, 2025

Partner4Work  
650 Smithfield Street, Suite 2400  
Pittsburgh, PA 15222

**RFP Release Date:**  
January 24, 2025

**Partner4Work (TRWIB, Inc.) is an equal opportunity employer.**

**Auxiliary aids and services are available upon request to persons with disabilities.**

Partner4Work's EARN and Work Ready Programs are funded 100% by federal grants from Temporary Assistance for Needy Families (TANF) and the Supplemental Nutrition Assistance Program (SNAP), provided by the US Department of Health and Human Services (USHHS) and the US Department of Agriculture (USDA) via the Pennsylvania Department of Human Services (PADHS). Subject to availability, final allocations, and applicable rules and regulations, Partner4Work intends to make available an estimated funding range of \$80,000 to \$200,00 in combined TANF and SNAP funding to finance any agreements resulting from this RFP, with the majority of funds coming from TANF. Any subrecipients selected for agreements through this RFP must comply with all applicable regulations and the terms and conditions of the TANF and SNAP grants provided by USHHS, USDA and PADHS.

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**About Partner4Work**

TRWIB, Inc. (dba “Partner4Work”) is the workforce development organization that connects funding, expertise, and opportunities to develop a thriving workforce in Pittsburgh and Allegheny County. With a budget of more than \$30 million in public and private workforce funds, Partner4Work has a comprehensive portfolio of programs and initiatives for adults and youth to ensure that the current and future needs of employers, job seekers, underemployed workers, and justice impacted individuals are met.

As the Workforce Development Board for Pittsburgh and Allegheny County, Partner4Work has programmatic and administrative responsibility for services of the Workforce Innovation and Opportunity Act (WIOA) provided in the workforce development areas of Pittsburgh and Allegheny County. Partner4Work also oversees employment and training programs for recipients of Temporary Assistance for Needy Families (TANF) and the Supplemental Nutrition Assistance Program (SNAP) in Allegheny County.

**Purpose of this RFP**

Partner4Work (P4W) has issued this Request for Proposals (RFP) to identify a qualified agency to provide adult education and literacy services for participants of the Allegheny County Employment Advancement and Retention Network (EARN) and Work Ready programs. These programs are designed to engage recipients of Temporary Assistance for Needy Families (TANF) and the Supplemental Nutrition Assistance Program (SNAP) in activities that prepare them for employment and provide them with opportunities to become self-sufficient. Participants of the program are referred exclusively through the Pennsylvania Department of Human Services (PADHS) by staff of local County Assistance Offices (CAO) and provided career and supportive services by community-based agencies contracted by P4W. Services will be offered at Allegheny County EARN/Work Ready locations, which may include one or both of the current PA CareerLink offices in Downtown Pittsburgh 914 Penn Ave Floor #6, Pittsburgh, PA 15222 and in Wilkins Township/Monroeville 300 Penn Center Blvd BLDG 3, Floor #8, Pittsburgh, PA 15235 as well as additional neighborhood center locations. Partner4Work also anticipates that the qualified agency can provide supporting evidence of their ability to work with partners, providers, and similar agencies for effective service delivery. The initial period of performance is expected to be July 1, 2025, through June 30, 2026, with up to 3 subsequent annual renewals, based on need, contractor performance, and procurement requirements.

Anticipated Program Dates and Contract Periods		
Contract period 1 (base)	July 1, 2025 – June 30, 2026	Base contract award
Contract period 2 (option)	July 1, 2026 – June 30, 2027	Renewable by P4W
Contract period 3 (option)	July 1, 2027 – June 30, 2028	Renewable by P4W
Contract period 4 (option)	July 1, 2028 – June 30, 2029	Renewable by P4W

Partner4Work intends to award around \$80,000, but up to \$150,000 for the initial period of performance to a qualified agency selected through this RFP. Actual funding amounts awarded may vary based on the availability of federal funds, program needs, and Partner4Work’s final determinations. Partner4Work reserves the right to adjust funding levels, modify contracts, or negotiate additional terms based on funding changes or emerging needs. The selected applicant will follow policies and guidelines of TANF, SNAP, PADHS, and Partner4Work, as they apply to the services sought by this RFP.

## **Services Sought**

The selected applicant must be able to provide high quality adult basic education, English as a Second Language (ESL), digital literacy and fundamental literacy services to up to 100 EARN and Work Ready participants annually through a combination of onsite classes, personalized one-on-one instruction, and remote learning activities, including but not limited to:

- Comprehensive and specialized educational assessment
- Adult basic education
- Digital/computer literacy
- Educational instruction and related guidance to support:
  - Obtaining a high school diploma or equivalency (HSE) through the General Equivalency Diploma (GED) exam or High School Equivalency Test (HiSET);
  - Pursuing and participating in vocational training or college; both in general and related to specific vocational training or college programs;
  - Career readiness/workforce preparation; both in general and related to specific occupations or job opportunities; and
  - Preparing for tests, exams, certifications, or other assessments related to participants' educational and career goals
- English as a Second Language (ESL) instruction
- Career readiness support to non-traditional students
- Demonstrate the ability to collaborate with various providers and system partners to ensure effective and comprehensive service delivery.

Services sought by this RFP must be made available to participants in-person and virtually, in close coordination with staff of the EARN and Work Ready programs, who will be providing career services and case management to the same participants concurrently. The selected applicant will strive to integrate the services they provide with other services participants are receiving or activities they are participating in.

## **Locations**

The selected applicant will deliver services to individuals participating in the EARN and Work Ready programs at select EARN and Work Ready center locations, which may include one or both of the current PA CareerLink offices in Downtown Pittsburgh 914 Penn Ave Floor #6, Pittsburgh, PA 15222 and in Wilkins Township/Monroeville 300 Penn Center Blvd BLDG 3, Floor #8, Pittsburgh, PA 15235 as well as additional neighborhood center locations. Basic working arrangements, office accommodations, technology for participants, and classroom space will be made available to the selected applicant. The selected applicant must also have the capacity to offer services remotely, providing participants with the option to engage in services virtually.

## **Population to be Served**

The EARN and Work Ready Programs receive referrals from the population of TANF and SNAP recipients in Allegheny County, which represents a diverse range of individuals who present differing levels of educational background, different levels of English Language Proficiency, work experience, skills and barriers to employment. The selected applicant must provide flexible services that meet the needs of participants and will have demonstrated experience in delivering educational services to a similarly diverse population on a comparable scale.

The EARN and Work Ready programs serve close to 1,000 participants per year in EARN and Work Ready programs. In a typical year, approximately 10-15% of all participants do not have a high school diploma or equivalent. The number of non-English speaking participants in the EARN and Work Ready programs is increasing, in PY 23 EARN and Work Ready programs offered employment and training services to up to 30 English language learners. Therefore, a selected applicant must have the capacity and experience working with non-English speaking participants through quality English as a Second Language (ESL) instruction and vocational programming.

Partner4Work expects the selected applicant to receive referrals and provide services for up to 100 EARN and Work Ready participants annually. Referrals could be for one or more service offerings aforementioned.

### **Performance Indicators and Goals**

The EARN and Work Ready programs are held to performance standards established by PADHS and P4W, including participant achievement of a high school diploma or equivalency, completion of vocational and work-based training, attainment of industry-recognized credentials, gaining and retaining unsubsidized employment and increases in earned income. The selected applicant's success will be evaluated based on their ability to support EARN and Work Ready participants in achieving these and related program goals. The selected applicant will also be evaluated based on their ability to successfully enroll and engage participants in the services sought, support participants in completing the services sought, and assist participants in reaching their educational and employment goals. Partner4Work will work with the selected applicant to establish, track, and evaluate more detailed performance standards.

Poor Performance: In the event the selected applicant's efforts do not result in satisfactory performance, Partner4Work will work with the selected applicant to improve performance; however, especially in cases of chronic underperformance, Partner4Work may implement corrective measures or terminate any agreement resulting from this RFP upon notice to the selected applicant.

### **Data Management and Reporting**

The selected applicant must regularly track and monitor data related to participants, service engagement, and outcomes, using observations and evaluation to ensure continuous improvement. Such efforts must be supported by strong internal systems and applications. The selected applicant is required to provide Partner4Work with timely reports and supporting documentation that clearly demonstrate program enrollment, participation, progress, outputs, and outcomes. Partner4Work will work with the selected applicant to understand reporting requirements and to determine the appropriate template for reporting outcomes and performance. Reporting frequency and content are subject to change at the discretion of Partner4Work.

### **Program Cost Reimbursement**

Payment related to any agreement resulting from this RFP will be made on a cost reimbursement basis. This means your organization must have the financial capacity to pay all program costs up front. Partner4Work will require an invoice, proof of expenses, and required documentation to process a reimbursement. Partner4Work will only reimburse the selected applicant for actual expenses incurred during the effective dates of the contract. The reimbursement timeline will be finalized during the contract negotiation. Allowable costs will be determined

by all applicable federal, state and local regulations, including but not limited to the Uniform Guidance<sup>1</sup>. Please see appendices for further fiscal guidance and requirements.

### **Health and Safety Planning**

PARTNER4WORK is committed to ensuring programs are equipped and prepared to operate safely. In delivering PROGRAM, SUBRECIPIENT must follow all federal, state, and local regulations regarding health and safety, including but not limited to the Centers for Disease Control (CDC), the Pennsylvania Department of Health, and the Allegheny County Health Department. SUBRECIPIENT must establish and maintain a plan to address all operational and programmatic considerations related to COVID-19 or other outbreaks and emergencies, including providing adequate protective equipment and other preventative measures, having a plan for swift action for containment or mitigation, social distancing and limitations on large gatherings, specific protections for vulnerable populations, and any other considerations defined federal, state, and local regulations and PARTNER4WORK.

### **Who can apply?**

Eligible applicants include non-profit and for-profit organizations, private sector entities, educational institutions, community-based organizations and other entities operating in accordance with federal, state and local law, and in business for at least three years. Applicants must be an incorporated organization. Eligible applicants must be in good standing with the federal government, not debarred, and have proof of insurance and a Unique Entity ID number. Organizations currently barred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by a Federal, State, City or County department/agency, quasi-governmental agency, or Partner4Work (P4W) are ineligible to apply. See appendices for more information on administrative requirements.

The selected applicant will have demonstrated experience and expertise in the provision of services sought by this RFP to the target populations described in this RFP. The selected applicant will have the capacity to serve up to 100 EARN and Work Ready participants annually through any agreement resulting from this RFP.

Applicant Competency – All applicants must have the technical competence, knowledge and expertise, management and administrative capabilities and capacity, professional staff, financial resources and stability, and administrative and fiscal systems to carry-out the work described in this RFP. Applicants must meet high standards of public service and fiduciary responsibility. Partner4Work requires assurance that the selected applicant's performance of the terms and conditions of any agreement resulting from this RFP be undertaken in accordance with the highest level of integrity and business ethics. Applicants must be able to implement a system of self-monitoring, including the review of key data related to performance, quality assurance, and financial integrity and accuracy. Applicants are responsible for being knowledgeable of all laws, regulations, rules, and policies of the funding sources identified in this RFP. If Partner4Work determines, at its sole discretion, that the selected applicant is not responsible, that it does not possess the administrative, fiscal, and/or technical resources and capabilities necessary to successfully perform under the terms and conditions of an agreement, it shall terminate the agreement immediately.

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<sup>1</sup> See Office of Management and Budget's Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards at 2 CFR 200.

## How to Apply

Interested and qualified applicants must submit proposals by February 28, 2025 at 11:59 pm EST to [rfp@partner4work.org](mailto:rfp@partner4work.org). Emails must have the subject line "Adult Education Proposal [Organization name]." Late or incomplete proposals will not be considered. Your proposal must address all the below.

- 1. Proposal Cover Sheet** – Use template provided. (See Partner4Work webpage for this RFP)
- 2. Organization Description** (maximum 2 pages)  
Provide a basic organizational description, including year established, legal status, governance structure, mission, principal programs and services, executive leadership, annual budget and number of full-time staff. Be sure to emphasize your experience in managing and providing the requested services, including history of successfully helping students earn their GED/High School Equivalency, improve literacy, increase digital competency of students, and demonstrated success in serving language learners and preparing for success in the workforce. Also describe your organization's administrative and fiscal capacity, including proven ability to provide fiscal support and oversight, utilize information systems, manage resources and personnel, and produce timely and accurate program reports.
- 3. Proposed Services** (maximum 4 pages)  
Describe your proposed services. Strong descriptions will clearly define the services you will provide and how they align with the standards and desired outcomes described in this RFP. Be sure to also describe the flow and timing of your services, from enrollment to assessment, planning, participation, outcomes, and follow up, as well as the technologies and related resources you will use to support your services.
- 4. Staffing plan** (organizational chart and short narrative)  
Provide an organizational chart and short narrative to illustrate and describe proposed staffing and volunteer arrangements for program-related, administrative and executive positions to support your services. In your narrative, please address how you will employ professional staff with required knowledge and expertise, ensure a high level of staff performance, and maintain regular and clear communication between proposed staff and EARN and Work Ready staff. Your narrative should not exceed 2 pages. Partner4Work encourages applicants to ensure that all staff members employed through any agreements resulting from this RFP receive a minimum salary aligned with the Partner4Work self-sufficiency wage effective at the time of this RFP.<sup>2</sup>
- 5. Budget & Budget Narrative** (spreadsheet and short narrative)  
Provide a budget including all program-related and administrative costs, using the template provided on the Partner4Work webpage for this RFP. Also, provide a narrative to accompany the budget that describes the purpose of each cost, explains how all costs were estimated and justifies the need for all costs in meeting contract requirements. Your narrative should not exceed 2 pages. All costs must be allowable according to applicable federal, state and local regulations, including but not limited to the Uniform Guidance and regulations of the funding source, and allocable to the proposed program. Effective budgets will enable the proposed program to meet the intent and requirements of the contract, while being realistic, reasonable and prudent, avoiding unnecessary or unusual expenditures. A strong budget narrative will minimize or eliminate the need for clarifications. If your proposal includes

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<sup>2</sup> See Partner4Work's Self Sufficiency Policy: <https://www.partner4work.org/document/self-sufficiency-policy-rev.-2024/>

leveraged resources of your organization or another organization, use the budget narrative to describe the actual or estimated value of the leveraged resources. Partner4Work intends to make up around \$80,000, but up to \$150,000 available for the initial period of performance through a cost reimbursement arrangement.

### **Review and Selection**

Partner4Work (P4W) will evaluate proposals based on the quality of responses to criteria described in the How to Apply section. P4W will make a selection based on the best value presented to the EARN and Work Ready programs.

### **RFP Timeline** (all dates are subject to change):

- Release of RFP: 01/24/2025
- Questions due: 02/05/2025
- Proposals due: 02/28/2025
- Selection of providers (estimated): 03/28/2025
- Selected provider mobilization (estimated): 05/15/2025
- Service commencement (estimated): 07/01/2025

### **Questions**

All questions or requests for additional information must be made in writing to [rfp@partner4work.org](mailto:rfp@partner4work.org) by 11:59 PM EST on 02/05/2025. Answers will be posted publicly at [www.partner4work.org](http://www.partner4work.org) on the webpage for this RFP. Interested parties are encouraged to check the website frequently for updates. Questions received after 11:59 PM EST on 02/05/2025 will not be answered.



## Disclaimers

- [Executive Order 2021-06, Worker Protection and Investment](#) must be followed throughout this RFP.
- This Request for Proposals (RFP) does not commit Partner4Work to award a contract.
- Partner4Work may select a firm based on its initial proposal received, without discussion of the proposal. Accordingly, each proposal should be submitted on the most favorable terms, from a price and technical standpoint, that the bidder can submit to Partner4Work. Partner4Work may, however, have discussions with those firms it deems in its discretion to fall within a competitive range.
- Partner4Work reserves the right to request additional information from any applicant, request oral presentations from applicants, or conduct site visits from any applicant before a contract award.
- Partner4Work reserves the right to fund portions of a proposal, or to reject any and all proposals in whole or in part. Rejection of a portion of a proposal does not necessarily negate the entire proposal.
- Partner4Work may, at its discretion, adjust the level of funding provided to successful bidders under this RFP and/or consider the funding of proposals not initially funded under this RFP at a later date.
- No costs will be paid to cover the expense of preparing a proposal or procuring a contract for services or supplies.
- All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to Partner4Work and be subject to disclosure under the Freedom of Information Act, Right to Know Law, or other applicable legislation.
- The contract award will not be final until Partner4Work and the successful bidder have executed a mutually satisfactory contractual agreement. Partner4Work reserves the right to make an award without further discussion of the proposal submitted. No activity may begin prior to final Partner4Work approval of the award and execution of a contractual agreement between the successful bidder and Partner4Work.
- The submission of the proposal warrants that the costs quoted for services in response to the RFP are not in excess of those that would be charged to any other individual for the same services performed by the bidder.
- Applicants are advised that most documents in the possession of Partner4Work are considered public records and subject to disclosure. Partner4Work reserves the right to issue additional RFPs if and when it is in Partner4Work's best interest to do so and may elect to negotiate and issue multi-year contracts to successful bidders under this or

- subsequent RFPs.
- All programs and activities are designated as equal opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities. Contact staff to request assistance with access to this RFP.
- Applicants must be capable of agreeing to the requirements set forth in the Partner4Work contract templates, available at <https://www.partner4work.org/document/partner4work-contract-templates/>.

## Appendix A: Adult Educational Services RFP Proposal Cover Sheet

**Lead Applicant:** Enter text here.

### A. Contact Information

Organization Name: Enter text here.

Address: Enter text here.

City: Enter text here. State: Enter text here. Zip Code: Enter text here.

Principal Contact Person: Enter text here. Title: Enter text here.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Enter text here.

Fiscal Contact Person: Enter text here. Title: Enter text here.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Enter text here.

Executive Director: Enter text here.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Enter text here.

### B. Legal Information

Type of organization (place a check mark (X) in the left column to indicate the type of your organization):

Select	Type of Organization
	For-profit
	Non-profit
	Government
	Educational institution

Please provide your current:  
 Federal Employer Identification Number ([FEIN](#)): Enter text here.  
 Unique Entity ID ([UEI](#)): Enter text here.  
 Commercial and Government Entity ([CAGE](#)): Enter text here.

**C. Certifications and Assurances**

*Please carefully review the below certifications and assurances. Place a check mark (X) in the left column to acknowledge the statements in the right column and complete the signature section to certify your responses.*

*If your proposal includes partner organizations, please understand that the below certifications and assurances may also apply to each partner. As the lead applicant, your responses should reflect the understanding and acknowledgment of each partner agency.*

By submitting this proposal and signing below, I certify and represent to Partner4Work the following:	
Check	Certifications and Assurances
	AUTHORIZATION. The above-named organization is legally authorized to submit this proposal.
	ACCURACY. All submitted proposal materials are true and accurate to the best of my knowledge.
	COMPLIANCE. My organization intends to accept and comply with the terms, conditions, requirements and payment provisions described in this RFP, if our proposal is selected and we are offered a contract.
	CONTRACT MANAGEMENT. My organization will use Partner4Work’s Contract Management Software for contract negotiation and administration, if our proposal is selected and we are offered a contract. Contract templates that may be used for agreements resulting from this RFP can be found at <a href="http://www.partner4work.org/document/partner4work-contract-templates/">www.partner4work.org/document/partner4work-contract-templates/</a> .
	CONTRACTOR INTEGRITY. My organization is compliant with the following <a href="#">PA state integrity policy</a> . If not, please submit along with your proposal a written explanation of why such certification cannot be made.
	SYSTEM FOR AWARD MANAGEMENT (SAM). My organization is <a href="#">registered</a> in the <a href="#">System for Award Management</a> (SAM) and our registration is current. If not, I am not aware of any impediment that would prevent my organization from successfully registering. Please understand that SAM registration may be a condition of award; i.e., if your proposal is selected through this RFP, your organization may need to register in SAM to receive a contract.
	RISK ASSESSMENT. Upon request by Partner4Work, my organization can complete a pre-award risk assessment that collects information regarding our organizational experience, overall staffing, subcontracting arrangements (if applicable), complaints or incidents, lawsuits, administrative systems, funding streams, and financial standing.
	INSURANCE. Upon request by Partner4Work, my organization can submit a Certificate of Insurance (COI) evidencing the types and amounts of insurance described below, and name Partner4Work as a certificate holder on the COI, if our proposal is selected and we are offered a contract. Comprehensive Commercial General Liability Insurance with limits not less than \$1,000,000 per occurrence and Aggregate not less than \$2,000,000. Automobile Liability Insurance with limits not less than \$1,000,000 per occurrence, combined single limit for bodily injury (including death) and property damage liability covering all owned, non-owned, and hired vehicles. Privacy/Cyber Liability Security Insurance with limits of not less than \$1,000,000. Worker’s Compensation Insurance as required by the Commonwealth of Pennsylvania.
	FINANCIAL AUDIT. Upon request by Partner4Work, my organization can submit our most recent

	financial audits, including a Single Audit ( <a href="#">2 CFR 200.501</a> ), as applicable, if our proposal is selected and we are offered a contract.
	FORM W-9. Upon request by Partner4Work, my organization can submit a completed <a href="#">Form W-9</a> (Request for Taxpayer Identification Number and Certification), if our proposal is selected and we are offered a contract.

**SIGNATURE REQUIRED ON NEXT PAGE**

**D. Signature of Authorized Representative**

*By signing below, I certify that I am legally authorized by the organization named herein to submit this proposal and represent the above certifications and assurances on behalf of the organization named herein. I understand that Partner4Work is relying on this representation to effectively conduct the procurement process and develop any agreements that may result from this RFP.*

Name of Authorized Representative: Enter text here.

Title of Authorized Representative: Enter text here.

Phone: Enter text here. Email: Enter text here.

**Signature of Authorized Representative:**

Date: Enter text here.

## **APPENDIX 1 - Records and Documentation**

The selected applicant must retain, secure and ensure the accuracy of all program files and records, whether related to jobseekers, businesses or general operations, in compliance with WIOA requirements, related federal and state regulations, and Partner4Work’s record retention requirements. Case files are the property of Partner4Work and must contain a variety of documentation including, but not limited to: program eligibility, suitability, and assessment data; individual participant plans; regular customer contacts and updates; progress reports, time and attendance sheets (training services); and case notes. Files must be retained for seven years after Partner4Work reports final expenditures to the funding source. The selected applicant must allow Partner4Work and representatives of other regulatory authorities access to all program-related records, materials, staff, and participants.

The selected applicant is responsible for maintaining and securing participant case files at all times, as well as ensuring privacy and protection of all personal information collected from participants per applicable laws, regulations and Partner4Work policies.<sup>3</sup> Confidentiality of participant information must be maintained and all case files must be properly stored in a secured space with limited staff access. Each staff member who has contact with participants or participant information must receive training on confidentiality requirements. The selected applicant acknowledges that the use or disclosure of participant information for purposes other than the effective delivery of the services described in this RFP is strictly prohibited. Staff of the selected applicant may have access to this information only on a “need to know” basis. The selected applicant must inform employees that inappropriate use of such information may result in disciplinary action, including discharge, or criminal prosecution if the employee knowingly uses the information for fraudulent purposes.

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<sup>3</sup> P4W’s Personal Information Policy: <https://www.partner4work.org/document/personally-identifiable-information-policy/>

## **APPENDIX 2 - Monitoring and Evaluation**

P4W is responsible for all levels of program monitoring, compliance and evaluation for education activities. The selected applicant will be required to keep good records and collect data that will help P4W comply with such requirements and sustain highly effective workforce development programming.

**P4W Responsibilities:** P4W will monitor, evaluate and provide guidance and direction to the selected applicant in the conduct of services performed under any agreement resulting from this RFP. P4W has the responsibility to determine whether the selected applicant has spent funds in accordance with applicable laws and regulations, including federal audit requirements, and will monitor the activities of the selected applicant to ensure such requirements are met. P4W may require the selected applicant to take corrective action if deficiencies are found.

**Subrecipient Responsibilities:** The selected applicant will permit P4W to carry out monitoring and evaluation activities, including any performance measurement system required by applicable law, regulation, and funding source guidelines, and the selected applicant agrees to ensure, to the greatest extent possible, the cooperation of its agents, employees and board members in such monitoring and evaluation efforts. This provision shall survive the expiration or termination of any agreement resulting from this RFP.

The selected applicant understands that all books and records pertaining to any agreement resulting from this RFP, including payroll and attendance records of participating employees, are subject to inspection by P4W, federal or state agencies and others for auditing, monitoring or investigating activities pursuant to any agreement resulting from this RFP. Said books and records shall be maintained for a period of SEVEN (7) years beyond the completion of any agreement resulting from this RFP. If the selected applicant receives notice of any litigation or claim involving the grant award or otherwise relating to any agreement resulting from this RFP, the selected applicant shall retain records until otherwise instructed by P4W.

### **APPENDIX 3 - Overview of Fiscal System Requirements**

At a minimum, all subrecipient organizations must meet the Standards for Financial and Program Management found at 2 CFR 200 in the OMB Uniform Guidance, as well as any regulatory requirements related to the funds. Your organization's financial management system must provide for the following:

**1. Tracking spending on multiple individual funding streams**

Identification, in its accounts, of all Federal awards received and expended and the Federal programs under which they were received. Federal program and Federal award identification must include, as applicable, the CFDA title and number, Federal award identification number and year, name of the Federal Agency, and name of the pass-through entity (i.e., Partner4Work).

**2. Fiscal reporting on an accrual basis**

Accurate, current, and complete disclosure of the financial results of each Federal award or program in accordance with the reporting requirements set forth in 2 CFR 200.327 Financial Reporting and 200.328 Monitoring and Reporting Program Performance. If a Federal awarding agency requires reporting on an accrual basis from a recipient that maintains its records on other than an accrual basis, the recipient may develop accrual data for its reports on the basis of an analysis of the documentation on hand. Similarly, a pass-through entity must not require a subrecipient to establish and accrual accounting system and must allow the subrecipient to develop accrual data for its reports on the basis of an analysis of the documentation on hand.

**3. Maintaining documentation supporting all spending and assets**

Records that identify adequately the source and application of funds for federally-funded activities. These records must contain information pertaining to Federal awards, authorizations, obligation, unobligated balances, assets, expenditures, income and interest and be supported by source documentation.

**4. Maintaining internal controls that ensure compliance with all funding regulations**

Control over, and accountability for, all funds, property, and other assets. The non-Federal entity must adequately safeguard all assets and assure that they are used solely for authorized purposes. See § 200.303 Internal Controls.

**5. Producing a budget to actual report**

Comparison of expenditures with budget amounts for each Federal award.

**6. Processing payments on a reimbursement basis**

Written procedures to implement the requirements of § 200.305 Payment.

**7. Budgeting and spending funds in allowable cost categories (i.e., direct, indirect, program, and admin costs)**

Written procedures for determining the allowability of costs in accordance with Subpart E - Cost Principles of this part and the terms and conditions of the Federal award.



#### **APPENDIX 4 - Budget Narrative Instructions**

The budget narrative must provide a description of costs associated with each line item in the budget template. It should also include a description of leveraged resources provided (as applicable) to support grant activities.

In addition to a description of costs included in each line item on the budget template, please include the following in the budget narrative:

**Personnel:** List all staff positions by title (both current and proposed). Give the annual salary of each position, the percentage of each position's time and salary devoted to the project, and the total personnel cost for the period of performance.

**Fringe Benefits:** Provide a breakdown of the amounts and percentages that comprise fringe benefit costs such as health insurance, FICA, retirement, etc.

**Other:** Provide clear and specific detail, including costs, for each item so that Partner4Work can determine whether the costs are necessary, reasonable and allocable. List any item not covered elsewhere here.

**Indirect Costs:** If you include indirect costs in the budget, then include one of the following:

a) If you have a Negotiated Indirect Cost Rate Agreement (NICRA), provide an explanation of how the indirect costs are calculated. This explanation should include which portion of each line item, along with the associated costs, are included in your cost allocation base. Also, provide a current version of the NICRA.

or

b) If you intend to claim indirect costs using the 10 percent de minimis rate, please confirm that your organization meets the requirements as described in 2 CFR 200.414(f). Clearly state that your organization has never received a Negotiated Indirect Cost Rate Agreement (NICRA), and your organization is not one described in Appendix VII of 2 CFR 200, paragraph (D)(1)(b).

Applicants choosing to claim indirect costs using the de minimis rate must use Modified Total Direct Costs (see 2 CFR 200.68 below for definition) as their cost allocation base. Provide an explanation of which portion of each line item, along with the associated costs, are included in your cost allocation base. Note that there are various items not included in the calculation of Modified Total Direct Costs. See below the definitions to assist you in your calculation.

2 CFR 200.68 Modified Total Direct Cost (MTDC) means all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and up to the first \$25,000 of each subaward (regardless of the period of performance of the subawards under the award). MTDC excludes equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000. Other items may only be excluded when necessary to avoid a serious inequity in the distribution of indirect costs, and with the approval of the cognizant agency for indirect costs.

The definition of MTDC in 2 CFR 200.68 no longer allows for any sub-contracts to be included in the calculation. You will also note that participant support costs are not included in modified total direct cost.

2 CFR 200.75 Participant Support Cost means direct costs for items such as stipends, travel allowances, and registration fees paid to or on behalf of participants or trainees (but not employees) in connection with conferences, or training projects.

See Section IV.B.4. and Section IV.E.1 for more information. Additionally, the following link contains information regarding the negotiation of Indirect Cost Rates at DOL:

<https://www.dol.gov/sites/dolgov/files/OASAM/legacy/files/DCD-2-CFR-Guide.pdf>