**PROPOSAL INSTRUCTIONS**

The Proposal for Management of Direct Child Care Services System for WFSCB is intended to be the Respondent’s approach to managing and operating a Direct Child Care Services System in a manner to exceed contracted performance measures, provide exemplary services to customers, be accountable for all compliance requirements, and represent WFSCB and its goals and objectives for workforce development in the Coastal Bend WDB. Any or all parts of the Proposal may become a part of the contract if selected. Therefore, the Proposal should be realistic in its portrayal of Respondent’s abilities and expertise.

Proposals must include all Forms and Attachments listed on the Proposal Checklist.

Proposals may be submitted electronically or in paper form. If submitted in paper, an electronic version must also be submitted. Paper submittals must be originals with all forms and certificates containing original wet signatures. Electronic versions must contain e-signatures and consist of a single PDF file and a single Excel file. Any differences between the original paper version and the electronic version are at the liability of the Respondent.

Note: Joint venture partners must each submit a signed statement stating they support the Proposal and their role in the proposed approach for operation and management of the direct child care services system. The signed joint venture statement must be part of the single PDF file. The electronic transmitted copy will be used to record and acknowledge receipt of the Proposal.

Paper versions may be submitted by mail, courier service or hand delivered to:

Nelda Rios, Contract and Procurement Specialist

Workforce Solutions Coastal Bend

400 Mann Street, Suite 800

Corpus Christi, TX 78401

Electronic versions should be submitted via email to: [Nelda.Rios@workforcesolutionscb.org](mailto:Nelda.Rios@workforcesolutionscb.org) or, if the file size is too large to transmit via email, a link from which the Proposal can be downloaded may be emailed.

**Proposals must be received by 4:00 PM on April 28, 2025.**

**Faxed or late Proposals will be ineligible and not accepted for consideration.**

Proposals which do not adhere to the submission requirements, will be ruled unresponsive to the specifications, and will not be considered under this procurement.

## FORM 1: PROPOSAL / RESPONDENT INFORMATION

## Name of Respondent Organization:

## Address:

## Name of Person to Contact regarding Proposal:

## Title:

## Telephone Number:

## Email Address:

## Name of Person Responsible for Contracting Authority:

## Title:

## Telephone Number:

## Email Address:

## Name of Person Responsible for Contracting Negotiations:

## Title:

## Telephone Number:

## Email Address:

## Proposal Summary Data:

## Proposed Total Budget Amount:

## Proposed Cash or In-Kind Contribution:

## Proposed Total Amount for Staff Salaries and Fringe:

## Proposed Total Amount for Direct Participant Training/Services:

## Proposed Total Number of Staff FTEs:

Signature of person who can commit organization to this Proposal:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Name of Authorized Representative Title of Authorized Representative

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Signature of Authorized Representative Date

**FORM 2. PROPOSAL CHECKLIST**

The items listed below should be submitted as the Proposal for Management of Direct Child Care Services System due April 28, 2025 at 4:00 PM Central Time.**.** Check each item included in your Proposal.

|  |  |
| --- | --- |
| **Included** | **Items in Proposal** |
|  | Form 1. Proposal / Respondent Information |
|  | Form 2. Proposal Checklist |
|  | Form 3. Proposal Narrative |
|  | Form 4. Proposed Fiscal Approach & Budget |
|  | Form 5. Budget Spreadsheets: |
|  | 1. Budget Summary by Funding Source |
|  | 1. Budget Summary by Line Item & Cost Category |
|  | 1. Staffing Salaries |
|  | 1. PEO Budget if applicable |
|  | 1. Budget Narrative |
|  | Attachment A - Proposed Organizational Chart |
|  | Attachment B - Child Care Staff Training Matrix |
|  | Attachment C - Customer Flow Chart |

I have verified that all of the requested information is contained in this Proposal.

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Name of Authorized Representative Title of Authorized Representative

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Authorized Representative Date

**FORM 3. PROPOSAL NARRATIVE**

Please provide a thorough response to each of the items listed below. Exhibits may be referenced in the narrative and provided in the Attachments. Any reference to attachments in the narrative must include the name of the attachments and page number(s).

Proposed Management of Direct Child Care Services System

1. WFSCB Goals

Describe your proposed contribution to achieving each of WFSCB’s seven goals through your management of Child Care Services. Discuss strategies and projected outcomes of each strategy and its connection to achieving the goal.

1. Management and Staffing

Management is the process of planning, organizing, leading and controlling all phases of business operation in order to achieve the objectives of our organization. Describe the objectives of your organization. Describe your proposed approach for each of the following elements:

1. Management style
2. Business objectives in line with the vision of WFSCB
3. Staff Development, Morale and Support
4. Staff Accountability
5. Handling of confidential customer information
6. Communication
7. Anticipating and planning for changes in the business environment
8. Cooperation with partners and grantor agencies

**Managing Director with professional employer organization (PEO) Option: (If applicable)**

**Managing Director Proposers must respond to the following questions as an addition to responding to all the above criteria questions:**

* 1. Describe the procurement for the professional employer organization (PEO) or staff leasing company to include dates, proposals received, and the entity selected.
  2. Describe the PEO’s approach to the following functions:
     + Benefits Management
     + Payroll Services
     + Human Resources Management
     + Paid Time Off
  3. Provide a description of how the PEO’s staff will interact with the Managing Director of the workforce center system. Please provide the name of the single point of contact for these services.

Managing Directors must complete the PEO’s Budget (sheet D) of the FORM 5. Budget Spreadsheets Excel file.

1. Management Strategies
2. Describe your child care funds management strategies and processes to meet the monthly contracted performance goal. Provide examples of successful outcomes that you had with the process in a current or previous contract.
3. Provide an organization chart depicting all funded child care positions and lines of authority. (Note: All generic positions necessary for operating a WFSCB Career Center such as receptionist, phone operator, file room clerk, security, etc. will be the sole responsibility of the WFSCB Career Center Contractor not the Child Care Contractor.)
4. Describe the strategies your agency utilizes to identify and leverage available resources needed to serve customers. Provide examples of successful outcomes that you had with the process in a current or previous contract.
5. Describe your agency’s strategy for delivering quality customer service. Include in your discussion, meeting the need for child care timely, returning phone calls, resolving customer complaints, etc. What steps are taken to ensure that quality services are delivered to customers?
6. Describe your staff development strategies to support continuous learning and development of child care services staff. Provide a staff development matrix as **Attachment B** that lists your proposed training for staff. Include the source of the training for each topic. Include orientation and training for new staff as well as development of skills of current staff. What steps are taken to ensure that staff understands and applies the concepts and techniques that were the focus of the training activity?
7. Describe your strategies to ensure an efficient and effective Child Care services delivery system.
8. Describe any innovative projects your agency has successfully executed that improved the service delivery system, customer service, increased the efficiency of services, or improved the quality of child care services.
9. Describe your agency’s strategies for resolving any non-compliance issues that resulted in corrective action, performance improvement plans, or sanctions from any regulatory or contracted authority if applicable.
10. Describe your communication procedures (internal and external) to ensure that information is delivered in a timely and efficient manner to all levels of employees, customers, potential customers, and other constituencies.
11. What is your organization’s code of conduct for child care services staff?
12. Does your agency agree to assure coordination with Center management regarding a fair sharing of front desk reception duties based on program customer traffic or other negotiated arrangements?
13. Describe any best practices, systems, efficiencies which were implemented during the COVID-19 pandemic and that your organization still has in place.
14. Describe how your organization will respond to events/circumstances that occur in the futurethat cause staff to work remotely and continue providing services to customers.
15. Direct Child Care Services

Case Management Service Delivery Model

Contractor will deliver direct child care services using a case management service delivery model. Although the proposer may design and implement within the scope of guidelines and policy; WFSCB expectation is that each family is assigned a specific case manager to handle their navigation through the eligibility process and the same or another designated staff person for follow-up activities. At all points during the eligibility and case management process families will have a specific case worker assigned to be their advocate to assure the quality of customer service.

Contractor will participate in the on-going development and implementation of WFSCB’s paperless document and record keeping activities.

1. Provide a customer flow chart depicting the process for customer access to child care services, the services provided, and proposed outcomes. **Attach Customer Flow Chart as Attachment C.**
2. Describe your process for conducting Intake/Eligibility efficiently in the Workforce Centers. Include how you will serve walk-in and phone customers.
3. What are your internal procedures for verifying the initial and re- certification of eligibility? Describe the resources used to ensure that the customers are eligible for services. Discuss the eligibility of self-arranged providers.
4. Describe contractor’s process for managing provider agreements regarding the participating child care providers.
5. Describe your process for providing off-site customer orientations, eligibility, and assessment, when necessary.
6. Describe how you will assess a customer’s needs and coordinate services with the Workforce Career Center Contractor.
7. Describe your process for child care data management. Include in your discussion how you will ensure timely and accurate data and data integrity.
8. The Texas Child Care Connection (TX3C) system is a child care case management system that will be used to record attendance and pay child care providers. Describe your implementation plan for the TX3C.
9. The TX3C will be used to manage all functions of the child care program. Describe your plan for the use of the TX3C.
10. How do you ensure that required documentation is maintained in the case file and in the automated system?
11. Explain your processes to ensure confidentiality of all customer information.
12. Describe the internal controls used for ensuring that child care services are initiated and terminated timely and appropriately.
13. Describe your methodology of forecasting performance and expenditures (step by step) and the role it plays in determining the type(s) of child care funds management strategies and processes that will be used to meet the monthly contracted performance goal. Provide examples of successful outcomes that you have had with these processes in a current or previous contract.
14. Beyond contractual performance established by WFSCB, what internal organizational benchmarks (management tools), are you going to establish for child care services and how will these benchmarks be measured?
15. Describe your processes in managing allocated and local match funds effectively.
16. Provide examples of assurances for complying with Title III of the ADA. Specifically, address how your organization provides children and parents with disabilities with an equal opportunity to participate in the child care center’s programs and services.
17. Outreach/Recruitment

Describe your agency’s efforts for coordination and collaboration with community partners. Include the following information:

1. Describe how your agency will actively outreach eligible parents to maintain a waitlist backlog sufficient to feed program performance goals.
2. Describe how your agency will inform the community of child care services available through WFSCB.
3. What partnerships with other agencies will your agency use to enhance outreach activities in the region?
4. Describe how your agency will outreach to recruit more child care providers for the child care programs.
5. Describe your agency’s strategy for outreaching adults and dislocated workers, TANF/Choices participants, SNAP customers, and long term unemployed.
6. Describe your customer orientation procedures. Include the information to be provided and the manner in which it will be presented.
7. Describe how your agency will coordinate marketing strategies with the WFSCB Career Center Contractor and adhere to WFSCB’s *Strategic Marketing Standards and Guidelines.*
8. How will your agency ensure that Child Care services staff use all available community resources in serving customers?
9. Coordination and Collaboration

Describe your agency’s efforts for coordination and collaboration with community partners. Include the following information:

1. Describe how your organization will promote coordination and cooperation among the many social service agencies that are interested in child care for low income customers.
2. Discuss how your agency develops sound collaborations. Provide examples of successful outcomes. Include those partners you have identified within the Coastal Bend 11 county region in your discussion.
3. Describe how your organization will collaborate with the WFSCB One-Stop Contractor Career Center staff in ensuring an effective child care service delivery system that delivers quality customer service. Include communication and outreach strategies in your discussion.
4. Describe how your organization will coordinate communication and outreach strategies with the WFSCB One-Stop Contractor Career Center staff.
5. Quality Assurance and Monitoring
6. Describe your internal and external controls to ensure quality and compliance. Include your risk management process and your internal monitoring processes.
7. Describe your corrective action processes for addressing any deficiencies identified through internal and external monitoring. Address each of the following:
   1. Internal process for identifying and resolving program and compliance issues.
   2. Response to internal/external monitoring findings, corrective action plans, performance improvement plans, and/or sanctions.
   3. Ensure the accuracy and integrity of data and information.
   4. Evaluate the value of child care services offered to customers
   5. Use of information and data to support key organization processes and improve performance.
8. Explain your process for resolving issues and trends identified during case file reviews. What processes are taken to ensure staff is aware and patterns are not repeated?
9. What systems do you have in place to ensure fraud prevention within the child care program?
10. Describe your procedures and tools to assess customer satisfaction for child care services. Include a sample of your sampling instrument.
11. Transition

Discuss your plan for a smooth transition from the current Child Care Services contractor to your organization (or to another organization if you are the current contractor). The transition plan should address the following questions:

1. Develop and implement a reasonable transition plan designed to achieve an efficient transfer of responsibility to another entity, in a timely manner and to cooperate fully throughout the pre- and post- termination period until such transition is complete.
2. Identify contractor staff and activities necessary to ensure a smooth transition process. Describe the activities required of each party to the transition of management of Child Care Services functions and activities.
3. Describe the process for notification of customers and the WFSCB One-Stop Contractor Career Center staff. Include notification of child care providers with agreements and self-arranged providers.
4. What steps will your agency take to minimize the disruption of services to customers and child care providers?
5. Discuss your agency’s strategy for assessing current child care staff, any proposed probationary period, recruiting any needed additional staff, and negotiating salaries and benefits.
6. How do you propose to transition case files?
7. Provide a proposed timeline for all transition activities.

**FORM 4. PROPOSED FISCAL APPROACH AND BUDGET**

Provide a narrative describing your fiscal approach, all cost items, their calculations and justification. The narrative should:

1. Delineate all costs that are for other staff that are not cost allocated or not located in the centers operated by WFSCB and paid by other funds.
2. All management and oversight costs must be separate from operational costs and the methodology for allocating those costs based on funding must be explained (e.g. a percentage of a base or indirect base).
3. Describe how your agency will comply with the cost allocation codes in developing your budget and reporting expenditures. Explain in detail the cost that will be allocated for management and overhead of the contract (Cost Category) and how your agency will ensure the allocated amount will not exceed the respective percentage in the proposal.
4. Describe how your agency will forecast expenditures for child care services.
5. Describe any cash or in-kind contributions your agency will offer in your proposal. Please indicate cash or in-kind contributions on the budget forms where appropriate. For in-kind contributions please state the source and how the amount/value was calculated. Describe any stand-in costs, in kind and match that the bidder is proposing for this contract.
6. Include the completed Excel file named **Form 5. Budget Spreadsheets** as a sample of your proposed budget utilizing the funding information referenced on page 9 of this RFP. The Excel file is comprised of the following sheets:

**Form 5. Budget Spreadsheets**

1. Budget Summary by Funding Source: each cost element must be reasonable, allowable under regulations, and necessary to operate the proposed program.
2. Budget Summary by Line Item & Cost Category: list all costs associated with the proposed programs. Include in-kind or cash costs paid for by your organization or others on the next to last line, and the total costs of proposed program on the bottom line.
3. Staffing Salaries by FTE and Funding Source: present each proposed staff position and the funding amount in the appropriate fund source column. Positions charged to Code 709 should be budgeted in the appropriate section as indicated on the form.
4. PEO Budget (if applicable)
5. Budget Narrative: should demonstrate all calculations and provide a justification for each expenditure.

A PDF version of Form 5 should be included as part of your Proposal **and** the Excel file of Form 5 must be submitted together with the Proposal.

**INSERT A PDF VERSION OF FORM 5.A. HERE**

**INSERT A PDF VERSION OF FORM 5.B. HERE**

**INSERT A PDF VERSION OF FORM 5.B. HERE**

**INSERT A PDF VERSION OF FORM 5.C. HERE**

**INSERT A PDF VERSION OF FORM 5.D. HERE**

**FORM 6. CERTIFICATION BY RESPONDENT**

I hereby certify that the information contained in this Proposal and all attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. I certify that no employee, board member, or agent of WFSCB has assisted in the preparation of this Proposal. I acknowledge that I have read and understood the requirements and provisions of the RFP and directives in the implementation of this program.

I, certify that I am the of corporation, partnership, or sole proprietorship, or other eligible entity named as Respondent herein and that I am legally authorized to sign this Proposal and submit it to WFSCB, on behalf of said organization by authority of its governing body.

Person authorized to sign for the Signature of Individual Attesting

Organization Signatory’s Signature

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Signature Signature

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Name Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title Title

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Date Date



Subscribed and Sworn to before me on this \_ day of ,2025,

In , \_, \_.

(City) (County) (State)

Notary Public in and for County, State of

Commission expires: .

SEAL