



Pre-Proposal Conference

RFQ for
Fiscal Monitoring Services
RFQ 25-04





March 3, 2025



Proposers Need to Understand

- Background / Agency Information
- Purpose of RFQ
- Procurement Timeline
- Scope of Work
- Submission Requirements
- Evaluation & Scoring
- Other Information
- Point of Contact

Coastal Bend Workforce Development Board dba Workforce Solutions Coastal Bend

-  501(c)(3) Non-Profit Organization
-  Funding from Department of Labor through Texas Workforce Commission
-  FY25 Budget \$46 million
-  Mission, Vision & Strategic Board Goals.

A sunburst graphic consisting of numerous thin white lines radiating from a central point at the top of the page, creating a starburst effect behind the 'MISSION' header.

MISSION

At Workforce Solutions Coastal Bend, we invest in our regional success through access to jobs, training, and employer services.

VISION

We meet our mission through collaboration with industry, education, economic development, and labor to develop a comprehensive regional workforce strategic plan; develop a trainable and available workforce; and provide workforce relevant training opportunities for youth.

STRATEGIC BOARD GOALS

PARTNERSHIPS

Establish and Strengthen Partnerships

EFFICIENCY

Effectively and Efficiently Target Rural Area Services

AWARENESS

Increase Workforce Awareness

INNOVATION

Expand Innovative Services to Business

OPPORTUNITIES

Explore New Revenue Opportunities

TEAMWORK

Improve Internal Efficiencies

CULTURE

Refine Board Culture

Background: **CAREER CENTER LOCATIONS**




✦ Employer Driven: Career Center Services focus on employers' need for a knowledgeable, skillful workforce to help business become productive and competitive locally and in the global market.

✦ 11 County Coastal Bend Region


✦ 7 Full-Service Career Centers
Alice, Beeville, Corpus Christi,
Falfurrias, Kingsville, Rockport &
Sinton



Purpose of RFQ: *Fiscal Monitoring Services*

-  To solicit competitive proposals from qualified respondents to perform independent fiscal monitoring services including development of a risk assessment and monitoring plan, an annual and a follow-up review of WFSCB's subcontractors.
-  Monitoring Services should satisfy WFSCB's obligations under its contract with TWC and DOL to ensure compliance and fiscal integrity.
-  Solicitation may result in a contract or after reviewing proposals submitted, WFSCB may decide not to enter into any agreement.

Procurement: **RFQ TIMELINE**

- Mar 3 Release of RFQ & Start of Question Period
- Mar 10 Pre-Proposal Conference
- Mar 20 End of Question Period @ 5 pm
- Mar 25 Answers Posted on WFSCB Website @ 5 pm
-  ○ **Mar 31 Proposals Due by 4 pm**
- Apr 7-11 Proposal Evaluation Period
- Apr 14 Notice of Award / Non-Selection *(projected)*
- Apr 21 Contract Start Date *(projected)*

Procurement: **SCOPE OF WORK**

Services to be Provided (Section 1.5 on page 5 of RFQ)

Fiscal monitoring must be performed with the requirements set forth in the TWC Financial Manual for Grants and Contracts in accordance with Texas Administrative Code Title 40, Part 20, Chapter 802, Integrity of the Workforce System. Instances of fraud, waste, and illegal acts or indications of such, including all questioned costs must be covered and reported to TWC.

- Develop a timeline with milestones associated with the services to be provided and the deliverables to be produced. The work period being monitored will be July 1, 2024 through June 30, 2025 and all monitoring must be completed by September 30, 2025.
- Review of fiscal program requirements.
- Development and implementation of WFSCB's risk assessment tool.
- Fiscal reviews and monitoring of budgeting and accounting systems, including:

Services to be Provided continued

- Review timesheets and payments to participants for each contractor at least twice each year
- Provide a written report of reviews, including observations and findings, within 30 working days of the exit conference
- Identify instances of noncompliance with federal, state and agency requirements, and provide recommendations for corrective action and program quality enhancements
- Maintain backup files on each contractor reviewed that include supporting documentation from each review, including notes and working papers, completed monitoring guides, copies of relevant contractor documents, and other appropriate information, to support the monitoring report and any findings contained in the report and provide those files upon request
- Ensure the confidentiality of data and personally identifiable information throughout the monitoring process

Procurement: **SUBMISSION REQUIREMENTS**

Proposal Outline:

- Cover Page
- Table of Contents (with page numbers)
- Profile & Certification
- Qualifications & Experience
- Proposed Work Plan
- Resumes and Other Supporting Information
- Cost/Price Information
- Demonstrated Abilities / References
- Certifications & Assurances



Proposals Due March 31, 2025 by 4:00 PM

Procurement: **SUBMISSION REQUIREMENTS**

Proposal Format

- Proposals may be submitted in paper or electronically.
- If submitting in paper, an electronic version is also required.
- Electronic versions should be submitted as a single PDF file and emailed to:
Nelda.Rios@workforcesolutionscb.org



Proposals Due March 31, 2025 by 4:00 PM

Initial Screening for Responsiveness

- Proposal must be submitted by the RFQ deadline.
- Electronic versions must contain e-signatures.
- Proposal must be for the specific services requested and described in the RFQ.
- Proposal must be in the outline and order described in the RFQ.
- If requested, copies of resumes, licenses and/or certificates must be included.



Proposals Due March 31, 2025 by 4:00 PM

Criteria & Points

- **Qualifications & Experience 40 Points**
- **Proposed Work Plan 40 Points**
- **Demonstrated Ability/ References 20 Points**
- **HUB Certification 5 Points**
- **Total Possible Points 105**



Proposals Due March 31, 2025 by 4:00 PM

Procurement: **OTHER INFORMATION**

Term

- Initial contract will be awarded for a period not to exceed 12 months ending on September 30, 2025. Option to renew for an additional one-year period.

Insurance

- Contractor is required to maintain insurance coverage throughout the contract term.

Restrictions on Communication

- Communication promoting qualifications to WFSCB staff, Board of Directors or CEO Council is strictly prohibited until contract is awarded.



Proposals Due March 31, 2025 by 4:00 PM

Procurement: **POINT OF CONTACT**

Nelda Rios, Contracts and Procurement Specialist

Email: Nelda.Rios@workforcesolutionscb.org

Fax: 361.885.3057 *(for questions only, no proposals)*

Mail: Workforce Solutions Coastal Bend
400 Mann Street, Suite 800
Corpus Christi, TX 78401

- Questions must be submitted in writing.
- **Deadline for questions is March 20, 2025 @ 5 pm.**
- No questions will be accepted after the deadline.



Proposals Due March 31, 2025 by 4:00 PM