



# REQUEST FOR PROPOSAL SPECIALIZED FISCAL SERVICES

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## Michigan Works Southeast Consortium

### REQUEST FOR PROPOSALS

### Specialized Fiscal Services

**Michigan Works Southeast**

**21 Care Drive**

**Hillsdale, Michigan 49242**

RFP RELEASE DATE: June 22, 2022

RFP DUE DATE: by 4:00 p.m. local time  
July 06, 2022

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## SECTION I: OVERVIEW AND BACKGROUND

### Purpose

The Michigan Works! Southeast Consortium's Workforce Development Board is accepting proposals to provide Specialized Workforce Innovation in accordance with the specification, terms and conditions stated herein. It's our intent to award a one-year contract with the option of renewal. The WDB 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 in part or in its entirety this RFP, if it is in the best interest of the Board. The WDB reserves the right to enter into multi-year contracts with successful bidders if it is in the best interest of the program and the WDB.

The Mission of Michigan Works! Southeast is to develop today's workforce and tomorrow's economy by engaging employers, job-seekers and partners. Our vision is a community which fosters and sustains a strong diverse economy where people can live, work and prosper.

The Michigan Works! Southeast Consortium's Workforce Development Board (WDB) has adopted a strategic plan for its programs and operations. The plan will be made available to potential bidders. It is expected that programs and services delivered as a result of this RFP will advance the mission, vision and strategic goals of the WDB.

### Proposal Deadlines

Proposals are due by **4:00 p.m. Wednesday, July 06, 2022. Please submit one original signed proposal to:**

**Michigan Works! Southeast Consortium  
Attn: Maggie Flaherty  
21 Care Drive  
Hillsdale, MI 49242**

**An electronic version shall be submitted via e-mail to [mflaherty@mwse.org](mailto:mflaherty@mwse.org). (no thumb drive, flash drive or CD is acceptable).**

Bidders may not alter their proposals after the due date. Late proposals will not be received until regular business hours (8:00 a.m. - 5:00 p.m.), the next business day and are received as unsolicited proposals outside the procurement process.

### Review Process

Proposals will undergo the following review:

- *Michigan Works! Staff* – The review for technical compliance with the RFP, and analysis of program design and budget.
- *Michigan Works! Southeast Consortium's Workforce Development Board* – Will review in accordance with the published review criteria.

Contracts executed as a result of the review process will be between Michigan Works! Southeast Consortium and the proposing organization. The review and decision process generally take about four weeks.

### **Technical Assistance**

Prospective bidders may submit their questions in writing to Maggie Flaherty ([mflaherty@mwse.org](mailto:mflaherty@mwse.org)) by 4:00 p.m. Wednesday, June 29, 2022. Answers to these questions will be posted on the MWSE website or emailed upon request.

An RFP does not commit the Workforce Consortium Board (WCB) to award a contract, to pay any costs in the preparation of a proposal in response to this request, or to procure or contract for services or supplies. The WDB 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 in part or in its entirety this RFP, if it is in the best interest of the Board to do so. Further, all requested amounts are subject to reduction based upon final award selections and availability of funds.

Contracted Services will be for a 12-month period beginning at the execution of a contract. The WCB reserves the right to extend contracts in accordance with the terms the original contract if the contractor meets contracted performance goals and objectives. The budget for the extension will be negotiated in accordance with the terms of the original contract, with appropriate adjustments for inflation and fund availability.

Michigan Works! Southeast reserves the right to issue a new Request for Proposals at any time during the contract period for the services described in this procurement should changes in federal law and regulations make it necessary to do so. To insure fairness in the review process, prospective bidders should not discuss their proposal with individual WDB members, Consortium Board members, or Michigan Works! staff prior to the completion of the procurement (RFP) process. The procurement process ends upon execution of a contract with the successful bidder.

## **SECTION II: PROGRAM GOALS**

### **Specialized Fiscal Services**

MWSE is seeking multiple bidders for two (2) uniquely different fiscal function which will appropriately identify check and balances as well as segregation of duties to ensure clear fiscal integrity. The successful bidder(s) must propose a service design approach that will demonstrate the ability to provide support, review, assistance, and/or advisory services thorough, clear, and concise fiscal reports and presentation to the Consortium Board.

### **Eligible Contractors**

The WCB will consider proposals submitted by Public, Non-profit and for-profit organizations. Any organization capable of effectively serving these populations will be considered.

Organizations proposing programs through this RFP are required to document their experience in providing the proposed services.

### **Requirements for all Contractors**

- A. Contractors will identify themselves as part of the Michigan Works! system. Contractors will use the Michigan Works! Southeast logo in all promotional materials, publications, forms and written communications related to the contracted services.
- B. The services described in this RFP are part of the Michigan Works! system of integrated job seeker and employer services. If awarded a contract, bidders will be expected to work with other Michigan Works! staff to provide well-rounded service delivery.
- C. All contractors will conform to the minimum customer services standards established by the Department of Labor and Economic Opportunity- and the Workforce Development Board.
- D. Services to be provided under this RFP may be delivered in the selected counties at the local Michigan Works! Service Center, pending space availability. There is currently one center in each county. costs of space and equipment for administrative or program services not delivered at the Michigan Works! Service Centers must be included in your budget.
- E. Contract funds should not be used to purchase equipment. Usage fees for equipment owned by the bidder and used at other locations may be charged in accordance with generally accepted accounting principles, applicable OMB circulars and the 2 CFR 200.

F. Because of limited funds, bidders are encouraged to provide some, or all of the following costs as a match contribution to the project:

- In-direct administrative overhead costs
- Rent or other building charges when the building is owned by the bidder
- Administrative supervision
- Utilities, office supplies, photocopying and similar expenses which are part of the bidder's general operating budget.
- Staff training and development

### **SECTION III: PERFORMANCE STANDARDS FOR CONTRACTORS**

#### **Performance Indicators**

Contracts are developed as cost reimbursement or performance-based instruments. All contracts will contain specific performance criteria. We will expect bidders to propose performance goals with the understanding that any agreed upon goals should be designed to help Michigan Works! Southeast achieve our federal and state mandated performance criteria.

#### **Union Consultation and Review**

Proposed programs in occupational classifications within which employees are typically represented by labor organizations must secure review and comment on the program by officials of appropriate union locals. Contact the Michigan State AFL-CIO HRDI program at 517/372-0784 for assistance in locating the proper labor organization and/or for referral to appropriate officials. A “union consultation” form is available from Michigan Works! Southeast if needed.

#### **Records Reporting and Review**

All organizations awarded contracts as a result of this process will be required to comply with records and reporting systems as established by Michigan Works! Southeast for the purpose of documenting and evaluating program operations. In addition, program records and operations are subject to on-site review and/or transcription, in whole or in part, by representatives of Michigan Works! Southeast, the WDB, the Department of Labor and Economic Opportunity and U.S. Department of Labor.

#### **Audit Provisions**

All programs funded may be subject to audit in accordance with Federal, State and local County guidelines.

#### **Proposal Review Criteria**

The following criteria are the primary considerations in the proposal review process:

- A. Administrative and staffing capability
- B. Organizational Structure
- C. Project Design
- D. Performance Indicators
- E. Budget and Cost

## **SECTION IV: ASSURANCES AND PROPOSAL CERTIFICATIONS**

### **General Assurances**

The bidder assures that, if awarded workforce development funding based on this proposal, all programs and activities will comply with:

- The Workforce Innovation and Opportunity Act (WIOA) of 2014
- Section 188 of the WIOA of 2014, which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA Title I financially-assisted program or activity;
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin;
- Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities;
- The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.

In connection with the performance of work, the Workforce Development Board (WDB) and Michigan Works! Southeast Consortium further agree or certify that the Michigan Works! Agency (MWA) will comply with the provisions of:

- Executive Order 11246, as amended by 11375 (41 Code of Federal Regulation [CFR] Parts 60-64);
- Rehabilitation Act of 1973, as amended, Section 503 (29 United States Code (USC) 793), Public Law (PL) 93-112;
- Americans with Disabilities Act of 1990 (42 USC 12101 et seq.), PL 101-336;
- Pregnancy Discrimination Act of 1975 (92 Statute [Stat] 2076), PL 95-555;
- Civil Rights Act of 1964, Title VII (42 USC 2000 et seq.), PL 88-352;
- Civil Rights Act of 1968, Title VIII (42 USC 300 et seq.), PL 90-284;
- Civil Rights Restoration Act of 1991 (20 USC 1686-1688, 29 USC 706 and 709, 42 USC 2000[d]-4[a] and 6107), PL 100-259;
- Affirmative Action Provisions of the Vietnam Era Veterans' Readjustment Assistance Act, as amended (38 USC 4218), PL 72-74;
- Equal Pay Act of 1963, as amended (29 USC 206[dl]), PL 88-38;
- Elliott Larsen-Civil Rights Act, as amended (Michigan Consolidated Laws Annotated [MCLA] 37.2101 et seq.), Public Act (PA) 456 of 1976;
- Persons with Disabilities Civil Rights Act (MCLA 37.1101 et seq.), PA 220 of 1976.

The Bidder must comply with all applicable federal and state laws including, but not limited to, the following:

- Immigration and Naturalization Act of 1986 (8 USC 1324[al], PL 99-603;
- Family and Medical Leave Act of 1993 (29 USC 2601), PL 103-3;
- Older Americans Act of 1965, as amended (47 USC 3001 and 3056 et seq.), PL 89-73;
- Military Selective Service Act, Title I, Section 3, as amended (50 USC 453), PL 97-86;
- Privacy Act of 1974 (5 USC 522[a][e][3]), PL 93-579;
- Whistle Blower's Protection Act (MCLA 15.361 et seq.), PA 469 of 1980;
- Federal Hatch Act (5USC 1501-1508);
- Jobs for Veterans Act, PL 107-288, as amended by PL 112-56 (Reference: Employment and Training Administration [ETA] Training and Employment Guidance Letter [TEGL] No. 10- 09, issued November 10, 2009);
- Emergency Supplemental Appropriations Act for Defense, the Global War on Terror, and Hurricane Recovery, PL 109-234, which contains salary and bonus limitation requirements for the U.S. Department of Labor (USDOL)/ETA funded programs;
- Michigan Youth Employment Standards Act, as amended (MCLA 409.101-124), PA 90 of 1978; or the Federal Child Labor Regulations, Part 570, as amended, whichever is more stringent;
- Michigan Minimum Wage Law, as amended (MCLA 408.381-398), PA 154 of 1964;
- Michigan Payment of Wages and Fringe Benefits, as amended (MCLA 408.471-583), PA 390 of 1978; and Overtime Protection (MCLA 408.477), PA 390 of 1978;
- Michigan Workers' Disability Compensation Act, as amended (MCLA 418.101-941), and Administrative Rules, PA 317 of 1969;
- Michigan Open Meetings Act, as amended (MCLA 15.261 et seq.), PA 267 of 1976;
- Michigan Contracts with Employers Engaging in Unfair Practices, as amended (MCLA 423.321 et seq.), PA 278 of 1980;
- Michigan Occupational Safety and Health Act, as amended (MCLA 408.1001-1094), PA 154 of 1974;
- Michigan Right to Know Act (MCLA 408.1014[a]-1014[n]), PA 80 of 1986;
- MCLA 35.1093, insuring delivery of effective and equitable employment services to veterans, PA39of1994;

- Social Welfare Act, as amended (MCLA 400.55[a] and 400.56[f]), PA 280 of 1939;
- Title IV-F of the Social Security Act, as amended, PL 74-271;
- Michigan Welfare Policy Provisions, PA 223 of 1995;
- Title IV-A of the Social Security Act, as amended, PL 74-271;
- 45 CFR 201 through 257, and 260 through 265;
- Food Stamp Act of 1977, as amended, PL 105-33;
- 7 CFR 271, 272, and 273;
- The Workforce Innovation and Opportunity Act of 2014, PL 113-128;
- The Workforce Innovation and Opportunity Act Proposed Rules;
- Reed Act Provisions of Title IX of the Social Security Act;
- Trade Adjustment Assistance Reform Act of 1974, as amended;
- The Wagner-Peyser Act of 1933, as amended;
- The Michigan Employment Security Act of 1936, as amended;
- 20 CFR Part 653, with respect to equitable services to migrant and seasonal farm-workers and other requirements, as amended;
- Uniform Budgeting and Accounting Act, as amended, Michigan Public Act 2 of 1968;
- Uniform Unclaimed Property Act, Michigan Public Act 29 of 1995;
- 2 CFR Part 215, including Appendix A; Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations;
- Office of Management and Budget (OMB) Circular A-102; Grants and Cooperative Agreements with State and Local Governments;
- Common Rule (29 CFR Part 97 and 45 CFR Part 92); Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments;
- 2 CFR Part 220; Cost Principles of Educational Institutions;
- 2 CFR Part 225; Cost Principles for State, Local, and Indian Tribal Governments;
- 2 CFR Part 230; Cost Principles for Non-Profit Organizations;
- 48 CFR Part 31; Contract Cost Principles and Procedures [Commercial Organizations];
- OMB Circular A-133; Audits of States, Local Governments, and Non-Profit

Organizations;

- Single Audit Act of 1984 (31 USC 7501);
- Public Law 104-154-July 5, 1996m 104<sup>th</sup> Congress; Single Audit Amendments of 1996.
- Section 5 of Appendix A of 29 CFR 95, 29 CFR 97.36(i)(8), 45 CFR Part 74, 45 CFR Part 92; Notice of awarding agency requirements and regulations pertaining to patent rights.
- 2 CFR Part 200 et al.; Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards
- Any other laws, regulations and stipulations listed in the Michigan Works! System Plan and in effect between the MDLEO and The Consortium (System Plan available upon request).
- Grove City Civil Rights Bill, S557-PL-100-259, as amended
- Executive Order 1259, Debarment and Suspension, 29 CFR Part 98, Section 98.510
- All other applicable Federal and State legislation
- Any other laws, regulations and stipulations listed in the Michigan Works! System Plan and in effect between the Department of Labor and Economic Opportunity and The Consortium (System Plan available upon request).

Further, the bidder assures that:

- A. With respect to terms and conditions affecting, or rights provided to, individuals who are participants in activities supported by funds provided under the WIOA, such individuals shall not be discriminated against solely because of their status as participants.
- B. Participation in programs and activities financially assisted in whole or in part under the WIOA shall be open to citizens and nationals of the United States, lawfully admitted permanent resident aliens, lawfully admitted refugees and parolees, and other individuals authorized by the Attorney General to work in the United States.
- C. Programs funded under the Act will be administered in full compliance with safeguards against fraud and abuse as set forth in WIOA and WIOA Regulations.
- D. Full compliance with the Michigan Works! Southeast Equal Employment Opportunity (EEO) and Affirmative Action (AA) policy is assured.

### **Administrative Entity/WDB Held Harmless**

If awarded a contract, the bidder shall defend, indemnify and hold harmless the Administrative Entity/WDB, its officers, agents and employees from any and all claims and losses incurred by or resulting to any person, firm, or corporation who may be damaged or injured by the bidder in the performance of said contract.

The bidder, if awarded a contract, shall maintain at its expense during the term of the contract the following insurance:

- a. Workers' Compensation Insurance with the Michigan statutory limits an employer's liability insurance with a minimum limit of \$500,000 each accident.
- b. Comprehensive General Liability Insurance with a combined single limit of \$1,000,000 each occurrence for bodily injury and property damage. Policy shall include contractual liability coverage, and personal injury coverage.
- c. If there is to be transportation of participants during the course of the program, Automobile Liability Insurance covering all owned, hired and non-owned vehicles with personal protection insurance and property protection insurance to comply with the provisions of the Michigan No Fault Insurance Law, including residual liability insurance with a minimum combined single limit of \$1,000,000 each accident for bodily injury and property damage.

### **Certification Regarding Debarment and Suspension**

A prospective recipient of federal assistance funds, in accordance with Executive Order 12549, Debarment and Suspension, 29 CFR Part 98, Section 98.510, and Executive Order 12689, 2 CFR 215 Appendix A8, page 26297 is required to certify with an official signature on the Debarment and Suspension form that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in a transaction with any federal department or agency.

### **Certification Regarding Lobbying**

Prospective recipients of federal assistance funds must certify with an official signature on the Certification Regarding Lobbying form that no Federally appropriated funds have been used or will be used by the prospective recipient for the purpose of lobbying.

### **Project Parameters**

- a. Project services may be provided at the Michigan Works! Services Centers located in the Counties selected in their bid proposal or at the bidder's offices if more feasible. Depending on funding availability and customer needs, some services may also be provided at one or more satellite offices.

- b. Project bidders should maintain standard business hours during the program year. Bidders are encouraged to deliver some services during evening and/or weekend hours if feasible.
- c. MWSE contractors will support and promote the Michigan Works! “one-stop” service system and will be asked to work with MWSE and its community partners to improve the coordination and delivery of workforce services in the region.
- d. Project bidders should be aware that available funds for contract services are limited. Any costs incurred over the negotiated contract limits must be paid by the contractor. Organizations with demonstrated ability to match all or part of their budget, and/or with the ability to supplement contract funds with other resources will have priority in the review process.
- e. Costs associated with the operation and maintenance of the Michigan Works! Service Centers will be paid by Michigan Works! Southeast unless the bidder is a required one-stop partner as specified in WIOA. These costs include rent, utilities, and communication costs at the center, as well as office supplies and equipment used at the Center. All other operating costs and administrative costs must be reflected in the contract budget. If the bidder is a required one-stop partner, the partner’s contribution to the one-stop infrastructure costs will be negotiated in a separate infrastructure agreement.
- f. Project bidders must assist the Michigan Works! Southeast Consortium Development Board in achieving any Equal Opportunity benchmark.
- g. No individual shall be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with the project/activity because of race, color, religion, sex, national origin, age, handicap, or political affiliation or belief.

### **Accounting Records**

Each contractor must maintain acceptable accounting records. An adequate system of managing funds, and for keeping back-up data to support expenditures for audit purposes is the full responsibility of each contractor. No organization will be contracted to deliver funded services or activities unless the organization or agency can provide Michigan Works! Southeast with an acceptable accounting manual, or a statement from a Certified Public Accountant (CPA) that its accounting system meets generally accepted standards of accounting, or has had its accounting system reviewed and approved by Michigan Works! Southeast.

### **Allowable Costs**

Only costs directly related to the operation of program services and properly supported with back-up data and records will be allowable charges to the program. For shared time or facilities

arrangements, where staff wages, facilities, utilities, supplies, etc., are to be funded by more than one source, a costs allocation plan must be included in the funding application.

## **Reporting**

Upon approval of any project or activity for funding under this RFP, the agency or organization administering that project will be subject to an extensive set of reporting requirements as developed by the Department of Labor and Economic Opportunity (LEO) and Michigan Works! Southeast. These reports will be submitted as necessary to carry out the required schedule of reporting to the State of Michigan and to carry out monitoring and evaluation of programs as mandated by LEO and its policies and regulations. Failure to submit required participant and fiscal reports on timely basis could result in cancellation or non-renewal of the contract.

If awarded funding, the bidder shall:

- a. Accept and implement all management, fiscal, participant and special reporting requirements established by the Michigan Works! and shall maintain such records and accounts, including property, personnel and financial records, as deemed necessary by the MWSE office to assure a proper accounting of all funds.
- b. Provide access and the rights to examine, transcribe and audit all records, books, papers, tapes or documents related to contract performance to Michigan Works! the WDB, the State or their designated agents.
- c. Record all costs incurred, and report these costs in the manner and format prescribed by MWSE and in conformance with applicable Federal/State requirements.
- d. Report program income earned as a result of activities funded in whole or in part by the contract. Program income means gross income earned by the contractor that is directly generated by a supported activity or earned as a result of the contract award during the period of performance. Program income includes but is not limited to income from fees for services performed, the use or rental of real or personal property acquired under this contract, and license fees and royalties on patents and copyrights which were supported by grant funds.
- e. Retain all records pertinent to the program, including financial, participant and statistical records and supporting documents, for at least five (5) years from the date of expiration of any contract awarded as a result of this proposal. If, prior to the end of the retention period of any contract awarded as a result of this proposal, any litigation or audit is begun, retention of records shall be extended until the litigation or audit is resolved.

### **Supplemental Nepotism Clause**

The bidder must assure that during the time period of the proposed program, any individuals who are members of the immediate family of the bidder's staff or governing board will not be enrolled as program participants in the offered program without declaration ahead of time. Immediate family member is defined as: father, mother, sister, brother, child, aunt, uncle, nephew, niece, grandmother or grandfather. The nepotism clause also holds for any individual related to persons in an administrative capacity for Michigan Works! Southeast, the Michigan Works! Southeast Consortium Board and the Workforce Development Board.

### **Prevention of Fraud and Program Abuse**

To ensure the integrity of LEO programs, special efforts are necessary to prevent fraud and other program abuses. Fraud includes deceitful practices and intentional misconduct, such as willful misrepresentation in accounting for the use of program funds. "Abuse" is a general term which encompasses improper conduct which may or may not be fraudulent in nature. While LEO law and regulations are specific, possible problem areas could include the following: conflict of interest, kickbacks, commingling of funds, charging fees to participants and employers, nepotism and child labor, political patronage, political activities, sectarian activities, unionization and anti-unionization activities/work stoppages and maintenance of effort. Proposals which are found to violate the abuse standards will not be funded. Bidders who receive contracts will be required to report immediately any violations in these areas or in problem areas which may later be defined.

### **Monitoring**

Michigan Works! Southeast will be monitoring, auditing, and evaluating services provided under this Request for Proposals throughout the contract period. Contractors must allow Agency staff or its agent full access to all files and records relating directly to Agency funds, participant case files, accounting files and records, and to any related files and records associated with proper accounting of such funds and participants.

### **Audit Provisions**

Contractors receiving Federal/State funds must, under certain circumstances, arrange to pay for audits of their organizations and programs. Therefore, it is important that each contractor (1) determine it must audit its organizations and programs, and (2) provide sufficient funds in its budget if it must conduct audits. The guidelines described below should enable each contractor to determine its audit responsibilities and provide for audit costs in its budget if necessary. Contractors who are non-profit corporations are required to have an audit completed in accordance with 2 CFR 200. Single audits will be required for review by MWSE staff. LEO interprets this new section of the regulations to require that such organizations have an annual financial and compliance audit with an internal control review either: (1) performed on a program-specific basis in accordance with generally accepted government auditing standards, or

(2) which includes federal funds within the scope of their organization-wide audit. Private-for-profit commercial organizations shall review federal 2 CFR 200 for guidance on how the audit may be structured.

**SECTION V: PROPOSAL RESPONSE FORMS**

(Proposal Review Criteria, work statement, written narrative, and required forms will be included in this section).

**General Information**

Attach any additional pages necessary to respond fully to the questions. Each additional page should be numbered and sequenced, so that readers can easily discern how the addition ties to your proposal.

<b>1. General Information</b>
<b>A. ORGANIZATION INFORMATION</b>
ORGANIZATION'S NAME & ADDRESS: _____ _____ _____
CONTACT PERSON: _____ TITLE: _____
PHONE #: _____ E-MAIL: _____
FAX: _____
FISCAL CONTACT: _____ TITLE: _____
PHONE #: _____ E-MAIL: _____
FAX: _____

<b>B. Organization Structure</b>	
<input type="checkbox"/> Private Nonprofit	<input type="checkbox"/> Public or Nonprofit Educational Institution
<input type="checkbox"/> Public Nonprofit	<input type="checkbox"/> Community-Based Organization
<input type="checkbox"/> Private for Profit	<input type="checkbox"/> Female-Owned Business
<input type="checkbox"/> Unit of Local Government	<input type="checkbox"/> Minority-Owned Business
<input type="checkbox"/> Government Agency	<input type="checkbox"/> Other _____

**C. Authorship**

AUTHORED BY: \_\_\_\_\_

TITLE: \_\_\_\_\_

OGANIZATION: \_\_\_\_\_

PROFESSIONAL PROPOSAL WRITER\*:            Y            N            (Circle One)

\*The agency agrees that this person has not been (and will not be) paid a proposal writing fee from current or future Workforce Development funds.

**D. Required Documents**

Read, complete, sign, and attach the following documents, which appear on the following pages:

- "Certification Regarding Debarment , Suspension, Ineligibility and Voluntary Exclusion";
- "EQUAL OPPORTUNITY (EO) POLICY STATEMENT"; and
- "CERTIFICATION REGARDING LOBBYING"; and
- "GRIEVANCE/COMPLAINT POLICY STATEMENT"; and
- "Proposal Certifications"

**E. Funds Requested**

Total Price: \$ \_\_\_\_\_

This figure should equal the total amount requested and supported in your budget.

**F. Service Area(s)**

**PLEASE SELECT ALL COUNTIES THAT YOU ARE WILLING TO PROVIDE SERVICES IN:**

\_\_\_ Washtenaw

\_\_\_ Lenawee

\_\_\_ Livingston

\_\_\_ Hillsdale

\_\_\_ Jackson

## Instructions for Certification Regarding Debarment and Suspension

1. By signing and submitting this proposal, the prospective recipient of Federal assistance funds is providing the certification as set out below.
2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective recipient of Federal assistance funds knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the Department of Labor (DOL) may pursue available remedies, including suspension and/or debarment.
3. The prospective recipient of Federal assistance funds shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective recipient of Federal assistance funds learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations.
5. The prospective recipient of Federal assistance funds agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the DOL.
6. The prospective recipient of Federal assistance funds further agrees by submitting this proposal, that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion - Lower Tier Covered Transactions," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that is not debarred, suspended, ineligible, or voluntarily excluded for the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the List of Parties Excluded from Procurement or No procurement Programs.
8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the DOL may pursue available remedies, including suspension and/or debarment.

**Certification Regarding Debarment , Suspension, Ineligibility and Voluntary Exclusion**

**Lower Tier Covered Transactions**

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part 98, Section 98.510, participants' responsibilities and Executive Order 12689, 2 CFR 215 Appendix A8, page 26297. The regulations were published as Part VII of the May 26, 1988, Federal Register (pages 19160-19222).

- (1) The prospective recipient of federal assistance funds certifies, by submission of this certification, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.
  
- (2) Where the prospective recipient of Federal assistance funds is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this certification.

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Agency/Organization Authorized Signature

Date

**EQUAL OPPORTUNITY (EO) POLICY STATEMENT  
EQUAL OPPORTUNITY IS THE LAW**

It is against the law for this recipient of Federal financial assistance to discriminate on the following bases:

- Against any individual in the United States, on the basis of race, color, religion, sex (including pregnancy, childbirth, and related medical conditions, sex stereotyping, transgender status, and gender identity), national origin (including limited English proficiency), age, disability, political affiliation or belief; and
- Against any beneficiary of applicant to, or participant in programs financially assisted under the Title I of the Workforce Innovation and Opportunity Act (WIOA), on the basis of the beneficiary's citizenship/status, or his or her participation in any WIOA Title I-financially assisted program or activity.

The recipient must not discriminate in any of the following areas:

- Deciding who will be admitted, or have access, to any WIOA Title I-financially assisted program or activity;
- Providing opportunities in, or treating any person with regard to, such a program or activity; or
- Making employment decisions in the administration of, or in connection with, such a program or activity.

Recipients of federal financial assistance must take reasonable steps to ensure that communications with individuals with disabilities are as effective as communications with others. This means that, upon request and at no cost to the individual, recipients are required to provide appropriate auxiliary aids and services to qualified individuals with disabilities.

**What to do if you believe you have experienced discrimination**

If you think that you have been subjected to discrimination under a WIA/WIOA Title I-financially assisted program or activity, you may file a complaint within 180 days from the date of the alleged violation with the recipient's Equal Opportunity Officer:

**Local Contact**

**Maggie Flaherty, Equal Opportunity Officer**  
Michigan Works! Southeast 21 Care Drive, Hillsdale, MI 49242  
517-689-5111, or TTY:711

**Or**

**Director, Civil Rights Center (CRC)**  
U.S. Department of Labor  
200 Constitution Avenue, NW, Room N-4123  
Washington, D.C. 20210

If you file your complaint with the recipient, you must wait either until the recipient issues a written Notice of Final Action, or until 90 days have passed (whichever is sooner), before filing with Civil Rights Center (see address above). If the recipient does not give you a written Notice of Final Action within 90 days of the day on which you filed your complaint, you do not have to wait for the recipient to issue that Notice before filing a complaint with CRC. However, you must file your CRC complaint within 30 days of the 90-day deadline (in other words, within 120 days after the day on which you filed your complaint with the recipient).

If the recipient does give you a written Notice of Final Action on your complaint, but you are dissatisfied with the decision or resolution, you may file a complaint with CRC. You must file your complaint within 30 days of the date on which you received the Notice of Final Action.

If you have any questions regarding the EO Policy Statement, please discuss them with your assigned staff person.

I have received the EO Policy Statement on

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
Name (Printed)

\_\_\_\_\_  
Agency/Organization Authorized Signature

INSTRUCTIONS FOR COMPLETION OF SF-LLL,  
DISCLOSURE OF LOBBYING ACTIVITIES

Federal Register / Vol. 55. No. 38 / Monday,  
February 28, 1990 Rules and Regulations

This disclosure form shall be completed by the reporting entity, whether sub-awardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. Section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered federal action. Use the SF-LLL-A Continuation Sheet for additional information if the space on the form is inadequate. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered federal action.
3. Identify the appropriate classification of this report. If this is a follow-up report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, state and zip code of the reporting entity. Include Congressional District if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the sub-awardee, e.g. the first awardee of the prime is the first tier.
5. If the organization filing the report in item 4 checks "Sub-awardee", then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known
6. Enter the name of the Federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.

7. Enter the Federal program name or description for the covered Federal action (item I). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item I (e.g. Request for Proposal (RFP) number; Invitation for Bid (IFB) number; grant announcement number; the contract, grant or loan award number; the application proposal control number assigned by the Federal agency). Include pre-fixes., e.g."RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award loan commitment for the prime entity identified in item 4 or 5.
10. (a) Enter the full name, address, city, state and zip code of the lobbying entity engaged by the reporting entity identified in item 4 to influence the covered Federal action.  
  
(b) Enter the full names of the individual(s) performing services, and include full address if different from IO(a). Enter Last Name, First Name, and Middle Initial (MI).
11. Enter the amount of compensation paid or reasonably expected to be paid by the reporting entity (item 4) to the lobbying entity (item IO). Indicate whether the payment has been made (actual) or will be made (planned). Check all boxes that apply. If this is a material change report, enter the cumulative amount of payment made or planned to be made.
12. Check the appropriate box(es). Check all boxes that apply. If payment is made through an in-kind contribution, specify the nature and value of the in-kind payment.
13. Check the appropriate box(es). Check all boxes that apply. If other, specify nature.
14. Provide a specific and detailed description of the services that the lobbyist has performed, or will be expected to perform, and the date(s) of any services rendered. Include all preparatory and related activity, not just time spent in actual contact with Federal officials. Identify the Federal official(s) or employee(s) contacted or the officer(s), employee(s), or Members of Congress that were contacted.
15. Check whether or not a SF-LLL-A Continuation Sheet(s) is attached.
16. The certifying official shall sign and date the form, print his/her name, title, and telephone number.

## DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities  
pursuant to 31 U.S.C. 1352

See reverse for public burden disclosure.)

<b>1. Type of Federal Action:</b> <input type="checkbox"/> a. contract <input type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee	<b>2. Status of Federal Action:</b> <input type="checkbox"/> a. bid/offer/application <input type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	<b>3. Report Type:</b> <input type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change For Material Change Only: year _____ quarter _____ date of last report _____
<b>4. Name and Address of Reporting Entity:</b> <input type="checkbox"/> Prime <input type="checkbox"/> Sub-awardee  Tier _____, if known:  Congressional District, if known:	<b>5. If Reporting Entity in No. 4 is Sub-awardee Enter Name and Address of Prime:</b>   Congressional District, if known:	
<b>6. Federal Department/ Agency:</b>	<b>7. Federal Program Name/Description</b>  CFDA Number, if applicable:	
<b>8. Federal Action Number, if known:</b>	<b>9. Award Amount, if know:</b> \$	
<b>10. a. Name and Address of Lobbying Entity</b>	<b>b. Individuals Performing Services (including address if different from N. !0a)</b> (last name, first name, MI):	
<b>11. Amount of Payment (check all that apply):</b>  \$ _____ actual _planned	<b>12. Type of Payment (check all that apply):</b> <input type="checkbox"/> a. retainer <input type="checkbox"/> b. one-time fee <input type="checkbox"/> c. commission <input type="checkbox"/> d. contingent fee <input type="checkbox"/> e. deferred <input type="checkbox"/> f. other specify	
<b>13. Brief Description of Services Performed or to be Performed and Date(s) of Service, including officer(s), employee(s), or Member(s) contacted, for Payment Indicated in Item 11:</b>   <p style="text-align: center;">(attach Continuation Sheet(s) SF-LLL-A if necessary).</p>		
<b>14. Continuation Sheet(s) SF-LLL-A attached:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No		
15. Information required through this form is authorized by Title 31 U.S.C. Section 1352. 111e disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. this disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semiannually and will be available for public inspection. Any person who fails to file the required disclosure mil subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.	<b>Signature:</b> _____ <b>Print Name:</b> _____ <b>Title:</b> _____ <b>Telephone No:</b> _____ <b>Date:</b> _____	

**DISCLOSURE OF LOBBYING ACTIVITIES  
CONTINUATION SHEET**

Reporting Entity: \_\_\_\_\_ Page. \_\_\_\_\_  
of. \_\_\_\_\_

## **CERTIFICATION REGARDING LOBBYING**

### Certification for Contracts, Grants, Loans and Cooperative Agreements

The undersigned certifies, to be best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, any officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or any employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1325, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for such failure.

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Agency/Organization Authorized Signature

Date

**MICHIGAN WORKS! SOUTHEAST  
GRIEVANCE/COMPLAINT POLICY STATEMENT**

It is the policy of the Michigan Works! Southeast Consortium and Workforce Development Board that all program staff, applicants, participants and employers have the right to file a formal complaint or grievance. This policy covers all programs which we administer, including the Workforce Innovation and Opportunity Act (WIOA), Temporary Assistance for Needy Families (TANF), Food Assistance Employment and Training (FAE&T), Trade Act (except requests for redeterminations), and State of Michigan General Fund/General Purpose (GF/GP) Funded Programs Administered by the Department of Labor and Economic Opportunity (LEO). You are entitled to file a complaint or grievance if you believe that we have not adhered to applicable laws, regulations and policies in our administration of these programs, or if you believe you have been mistreated or faced discrimination. All grievances and complaints must be in writing and must be filed within one year of the alleged incident. Before filing a complaint or grievance, you should obtain a copy of our local grievance procedures, which describe in full the process for filing complaints and grievances, and the entire complaint resolution process, including procedures for informal resolution of complaints, formal hearings, and appeals. Copies of the procedure are posted in the Michigan Works! Service Center, and are available upon request from the Grievance/Equal Opportunity Complaint Officer, whose contact information is listed below. This is a summary of the steps in our complaint/grievance procedure:

- STEP 1            Informal discussion of your concerns to your immediate Michigan Works! Southeast contact.
  
- STEP 2            If Step 1 does not resolve the problem to your satisfaction, a formal written complaint may then be filed with the Complaint Officer of Michigan Works! Southeast for resolution through informal discussion. Please contact the Complaint Officer below for instructions on how to file a formal written complaint.
  
- STEP 3            If Step 2 does not resolve the problem to your satisfaction, you are entitled to request that a hearing be scheduled within 30 days of filing the complaint with a decision within 60 days. Please contact the Complaint Officer below for instructions on how to request a hearing.
  
- STEP 4            If Step 3 does not resolve the problem to your satisfaction, a formal complaint may be submitted to LEO. Please contact the Complaint Officer below for instructions on how to file a complaint with LEO
  
- STEP 5            If Step 4 does not resolve the problem to your satisfaction, a formal complaint may be submitted to the Secretary of the U.S. Department of Labor for determination.

If you ever have questions or need assistance with the complaint process, please do not hesitate to contact your assigned staff person or the Complaint Officer of Michigan Works! Southeast.

**Grievance/Complaint Officer**  
Vicki Enriquez 517-207-3253  
[venriquez@mwse.org](mailto:venriquez@mwse.org)

Name (Printed or Typed): \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Proposal Certifications**

These certifications must be signed by a representative of the applicant organization who is authorized to do so. Persons in an administrative, monitoring or oversight policy-making capacity with WIOA/PATH programs should not appear as signatory to this RFP.

I hereby certify:

- a. that the applicant organization understands and assures compliance with specific assurances and certifications contained in Section B if awarded funding on the basis of this proposal; and
- b. that all information contained in this proposal in response to questions concerning the applicant organization, its operation, and its proposed program, is true and accurate; and
- c. that completion of this proposal is an application for funding and does not ensure that the proposed program will be funded; and
- d. that if selected for funding, the applicant organization will be bound by the information contained herein as well as by the terms and conditions of the resultant contract or agreement.
- e. **that to the best of its knowledge and belief, the cost data are accurate, complete, and current at the time of agreement on price. This price shall be valid for a minimum of six months after submission.**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

## **SECTION VI: PROPOSAL REVIEW CRITERIA**

The following criteria are the primary considerations in the proposal review process:

### **C. Administrative and staffing capability (30%)**

- Describe your proposed management plan for this project, including
- Identify by name (if known) and job title the key staff who will be assigned to this project. Provide resumes and/or job descriptions for all staff who will be assigned to this project.
- Describe the bidder's past experience working with workforce programs.
- Describe how the bidder and/or key staff assigned to the project will manage and communicate on the project with the Michigan Works! Fiscal staff.

### **D. Organizational Structure (10%)**

- Provide an organizational chart, which shows how the proposed services fit into your overall organizational structure. Provide a brief narrative summary of the organizational chart.
- Provide a management plan with specific goals and objectives, which describes how the proposed services will be delivered (which staff will work on the project(s) and in what capacity).
- Will any portion of the program proposed be conducted by an organization other than your own (Will you be doing any sub-contracting with these funds)?

### **C. Project Design (20%)**

- Describe your proposed strategy as it relates to the Scope of Work outlined for the Audit Preparation Consultant and why your firm is the best to perform these services.
- Describe your plan for presenting any findings, recommendation, and/or remediation to MWSE.
- Briefly describe other financial services and/or expertise that you could provide to MWSE.

### **D Performance Indicators (20%)**

- Describe your method for reporting out the necessary information upon completing a project, please provide examples.

### **E Budget and Cost (20%)**

- Only costs directly related to the operation of the program and properly supported with back-up data and records will be allowable charges to the program. For shared time or facilities arrangements, where staff wages, facilities, utilities, supplies, etc., are to be funded by more than one source, a costs allocation plan must be included in the funding application.

## **SECTION VII: SCOPE OF WORK**

### **General Accounting Functions**

The successful bidder(s) must show expertise in providing support, review, assistance, and/or advisory services on all general accounting practices. Familiarity with Michigan's workforce development system is highly preferred. Specific knowledge of programs in the five-county region is also helpful, including awareness of the Federal and State grant process as it relates to workforce development programs. The resumes of those assigned to the project should reflect expertise in performing and/or managing the project. The quality and relevance of references will also be a factor.

The selected bidder will be responsible for assisting in the development of some or all required reports, per the 2 CFR 200:

- General Purpose Financial Statement
- Single Audit Report of Federal Awards
- Independent Certified Public Accountant report on the fair presentation of the basic financial statements in conformity with generally accepted accounting principles in the United States and standards.
- Independent Certified Public Accountant report on internal control over financial reporting and test of its compliance of laws, regulations, contracts and grants.
- Independent Certified Public Accountant "in-relation-to" report on the schedule of major and non-major federal financial awards and a report on Compliance and Internal Control over Financial Reporting.
- Assistance and review of the Management Letter on Internal Controls and Recommendations.
- A review of the Southeast Michigan Consortium's non-profit account.
- If required; provide support, review, assistance, and/or advisory services in completing Comprehensive Annual Financial Reports.
- A presentation to the Consortium Board regarding findings and recommendations for addressing concerns and any other items deemed report worthy.

All reports shall be presented and formatted in accordance with generally accepted accounting principles, Government Auditing Standards, Governmental Accounting Standards Board, Government Finance Officers Association, National Council on Governmental Accounting, United States Office of Management and Budget and the State of Michigan Department of Treasury.

All reports shall be prepared, reproduced and assembled by the selected bidder. Selected bidder shall be required to make an immediate, written report of all irregularities and/or potential finding which they become aware to MWSE.

### **Delivery of Services**

All of the above services may be offered at either Michigan Works! Southeast Service Center's or at the bidding location(s). All service locations will identify the availability of such services and as part of the Michigan Works! and national systems.

At the conclusion of the Consultant's project activities and periodically as the project progress, the Consultant will review the results of the project work with Michigan Works! Southeast and provide any observations related to the Consultant's services that the Consultant believes warrant attention. The Consultant also will provide Michigan Works! Southeast with a final written report on its findings, analyses and/or recommendations.

### **Performance Indicators**

Upon completion of requested services and/or projects MWSE will utilize any and all written reports, spreadsheets, and other documentation used to communicate completion of services and/or projects as an indicator of performance.

Bidders can propose additional performance indicators in their proposal that are related to their proposed services.

**SECTION VIII: BIDDER’S MANDATORY RESPONSE**

**General Accounting Functions**

**Administrative and staffing capability**

- A. Describe your proposed management plan for this project, including
  - Plans for hiring and selection of staff.
  - Plans for supervision and management of staff and program activities.
  - Plans for implementing quality systems and processes’
- B. Identify by name (if known) and job title the key staff who will be assigned to this project. Provide resumes and/or job descriptions for all staff who will be assigned to this project.
- C. Describe the bidder's past experience working with workforce programs.
- D. Describe how the bidder and/or key staff assigned to the project will manage and communicate on the project with the Michigan Works! Fiscal staff.

**Organizational Structure**

- A. Provide an organizational chart, which shows how the proposed services fit into your overall organizational structure. Provide a brief narrative summary of the organizational chart. *(Limit your narrative to one page).*
- B. Provide a management plan with specific goals and objectives, which describes how the proposed services will be delivered (which staff will work on the project(s) and in what capacity). *(Limit your response to two pages).*
- C. Will any portion of the program proposed be conducted by an organization other than your own (Will you be doing any sub-contracting with these funds)?  
Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, complete the following:

Organization Name:

Address:

Contact Person:

Title:

Phone:

Role of this organization in program operations. Please include the name of the individual(s), work they will be performing, and a copy of their credentials/certification. (Include resume):

**Project Design**

Describe your proposed strategy as it relates to the Scope of Work outlined for the Audit Preparation Consultant and why your firm is the best to perform these services.

Describe your plan for presenting any findings, recommendation, and/or remediation to MWSE.

Briefly describe other financial services and/or expertise that you could provide to MWSE.

**Performance Indicators**

Describe your methods for reporting out the necessary information upon completing a project, please provide examples.

**Budget and Costs**

A. Provide the date of establishment/incorporation: \_\_\_\_\_

B. Provide your federal Employer ID number: \_\_\_\_\_

**General Accounting Functions Budget**

Program Budget Detail  
 PY July 01, 2022 – June 30, 2023

General Accounting Functions

COMPANY NAME:	
ADDRESS:	
CONTACT PERSON:	PHONE:

Individual's Name and Title	Hourly Billing Rate	Estimated Hours Per Day	Estimated Cost	Daily Billing Rate	Estimated Days	Estimated Cost

**Attach a budget narrative or other background information to provide details or explanations of the proposed charges.**

**If desired, the budget template will be forwarded in Excel format upon request.**

## **SECTION IX SCOPE OF WORK**

### **Fiscal Consultant**

The successful bidder(s) shall provide the Michigan Works! Southeast, with advisory services in accordance with the AICPA's Statement on Standards for Consulting Services. The Consultant shall analyze the MWSE's fiscal policies and procedures and make recommendations as well as assist to ensure compliance with the laws and regulations pertaining to Michigan Works! Southeast's various funding sources and to meet Michigan Works! Southeast's internal and external record keeping and financial reporting needs. The Consultant shall provide these advisory services on an as-needed basis to the officers, managers and other Michigan Works! Southeast staff, as directed by the MWSE's Executive Director.

### **Delivery of Services**

All of the above services may be offered at either Michigan Works! Southeast Service Center's or at the bidding location(s). All service locations will identify the availability of such services and as part of the Michigan Works! and national systems.

At the conclusion of the Consultant's project activities and periodically as the project progress, the Consultant will review the results of the project work with Michigan Works! Southeast and provide any observations related to the Consultant's services that the Consultant believes warrant attention. The Consultant also will provide Michigan Works! Southeast with a final written report on its findings, analyses and/or recommendations.

### **Performance Indicators**

Upon completion of requested services and/or projects MWSE will utilize any and all written reports, spreadsheets, and other documentation used to communicate completion of services and/or projects as an indicator of performance.

Bidders can propose additional performance indicators in their proposal that are related to their proposed services. Bidders should propose performance goals in their proposal that are related to their proposed services.

**SECTION X: BIDDER'S MANDATORY RESPONSE**

**Fiscal Consultant**

**Administrative and staffing capability**

- D. Describe your proposed management plan for this project, including
  - Plans for hiring and selection of staff,
  - Plans for supervision and management of staff and program activities
  - Plans for meeting reporting requirements
- E. Identify by name (if known) and job title the key staff who will be assigned to this project. Provide resumes and/or job descriptions for all staff who will be assigned to this project.
- F. Describe the bidder's past experience partnering workforce programs.
- D. Describe how the bidder and/or key staff assigned to the project will manage and communicate on the project with the Michigan Works! Business Services staff.

**Organizational Structure**

- A. Provide an organizational chart, which shows how the proposed services fit into your overall organizational structure. Provide a brief narrative summary of the organizational chart. (Limit your narrative to one page).
- B. Provide a management plan with specific goals and objectives, which describes how the proposed services will be delivered (which staff will work on which programs and in what capacity). (Limit your response to two pages).
- C. Will any portion of the program proposed be conducted by an organization other than your own (Will you be doing any sub-contracting with these funds)?

Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, complete the following:

Organization Name:

Address:

Contact Person:

Title:

Phone:

Role of this organization in program operations. Please include the name of the individual(s), work they will be performing, and a copy of their credentials/certification. (Include resume):

**Project Design**

Describe your proposed strategy as it relates to the Scope of Work outlined for the Fiscal Consultant and why your firm is the best to perform these services.

Describe your plan for presenting any findings, recommendation, and/or remediation to MWSE.

Briefly describe other financial services and/or expertise that you could provide to MWSE.

**Performance Indicators**

Describe your methods for reporting out the necessary information upon completing a project, please provide examples.

**Budget and Costs**

A. Provide the date of establishment/incorporation: \_\_\_\_\_

B. Provide your federal Employer ID number: \_\_\_\_\_

**Fiscal Consultant Budget**

Program Budget Detail  
 PY July 01, 2022 – June 30, 2023

Fiscal Consultant

COMPANY NAME:	
ADDRESS:	
CONTACT PERSON:	PHONE:

Individual's Name and Title	Hourly Billing Rate	Estimated Hours Per Day	Estimated Cost	Daily Billing Rate	Estimated Days	Estimated Cost

**Attach a budget narrative or other background information to provide details or explanations of the proposed charges.**

**If desired, the budget template will be forwarded in Excel format upon request.**

## IMPORTANT NOTICE

### **Specialized Fiscal Services Checklist**

Make insure that you have adequately completed your proposal, which will allow speedy review for the consideration of funding, please review the following checklist of items before submitting your proposal packet to the Michigan Works! Service Center office.

1. Please verify the completion of **Section V: Proposal Response Forms** – General Information, Organization Structure, Authorship, Funds Requested, and Service Area(s). Please verify the completion of the:
  - **Debarment Form** – (appropriate signature).
  - **EQUAL OPPORTUNITY IS THE LAW Form** – (appropriate signature).
  - **LOBBYING ACTIVITIES Form** – (appropriate signature).
  - **GRIEVANCE/COMPLAINT POLICY STATEMENT** - (appropriate signature).
  - **Proposal Certifications Form** – (appropriate signature).
  
2. **Section VIII and/or Section X: Bidder’s Mandatory Response** – Please verify that you respond to the stated question, remember to describe how each program will be delivered and confirm that all actions will be implemented. Please verify the completion of the **Budget and Costs** questions and the **General Accounting Functions and/or Fiscal Consultant Budget** sheet.

### **Additional Instructions**

1. Questions regarding this RFP instructions and the submission of completed proposals may be addressed to Maggie Flaherty [mflaherty@mwse.org](mailto:mflaherty@mwse.org).
  
2. The proposal format identifies the appropriate response length for each question. Please limit your responses to the requested length. Be specific. Adherence to this instruction helps ensure consistency, review of all proposal questions. Enter N.A. for any question which does not apply to your program. Failure to complete any required section will result in rejection or an incomplete review and tabling of your proposal, causing delay in the approval process. The bidder must adhere to the text and instructions contained in the original RFP. Changes made by the bidder to the RFP file are the responsibility of the bidder and may result in rejection of the proposal.

3. Certain attachments are requested in the proposal format. Only those attachments specifically requested should be appended to your submission.
4. Catalogs and promotional materials should not be submitted and will not be reviewed as part of the evaluation process. If these materials should be needed by proposal reviewers, they will be requested at that time.
5. Proposals are due by **4:00 p.m.** Wednesday, July 06, 2022. **Please submit one original signed proposal to:**

**Michigan Works! Southeast Consortium  
Attn: Maggie Flaherty  
21 Care Drive  
Hillsdale, MI 49242**

**And an electronic version shall be submitted via e-mail to [mflaherty@mwse.org](mailto:mflaherty@mwse.org). (no thumb drive, flash drive or CD is acceptable).**

Bidders may not alter their proposals after the due date. Late proposals will not be received until regular business hours (8:00 a.m. - 5:00 p.m.), the next business day and are received as unsolicited proposals outside the procurement process.

3. Proposals must be complete and fully signed by an authorized official in order to be accepted. Members of the Michigan Works! Southeast Consortium and/or Workforce Development Board, or others with administrative oversight responsibilities, **may not sign the proposal.**