



PROCUREMENT DIVISION

Community Resources

Work First Kinship Services

Request for Proposal

#487-DL-DCR004005A

July 27, 2023

This Solicitation document is prepared in a Microsoft Word format. Any alterations to this document made by the Vendor may be grounds for rejection of proposal, cancellation of any subsequent award, or any other legal remedies available to Mecklenburg County.



Procurement Division
700 East 4th Street, 4th Floor
Charlotte, North Carolina 28202

July 27, 2023

This serves as official notice that Mecklenburg County located in Charlotte North Carolina through its Department of Community Resources is soliciting and will receive proposals for Work First Kinship Services. Requirements are outlined in the following specifications. Please review them carefully.

A **Non-Mandatory** Pre-Proposal Conference for the purpose of reviewing the Solicitation will be held as noted in the Schedule of Events.

Questions regarding the Solicitation must be submitted by the date noted in the Schedule of Events.

- Email to Meckbids@mecklenburgcountync.gov.
- In the Subject Line include:
 - Attention: Work First Kinship Services - #487-DL-DCR004005A
 - Demetrius Littlejohn, Procurement Analyst

Proposals are to be submitted **electronically** in [MECKProcure](#) on the date notated in the Schedule of Events. Use the Checklist on the following page as a guide in preparing and submitting your response to the Solicitation.

- **NIGP Code(s)**: 92418 - Educational Services, Alternative

To submit a response to the Solicitation, vendors must create a profile in [MECKProcure](#). For more information on vendor registration and how to submit a response, please visit the Vendor Resources Site [here](#).

Technical support to assist with completion of Business Diversity & Inclusion (BDI) Forms, vendor registration or submission of your proposal/bid response will be available up until the proposal/bid due date in the Schedule of Events. Please be advised, any request for assistance made after 1:00pm (EST) on the proposal/bid due date may not result in a successful bid submission.

- Contact for Technical Support:
 - Email: vendor.management@mecklenburgcountync.gov
 - Division Telephone: 980-314-2400

All changes to the terms, conditions or specifications stated in this Solicitation will be documented in a written addendum, issued by the Procurement Analyst. The Addenda will be posted in [MECKProcure](#), and may be accessed at this website by searching the Solicitation Number.

Sincerely,

Demetrius Littlejohn
Procurement Analyst

Checklist for Submitting A Proposal:

Instructions: This Checklist is to provide guidance in submitting a response to the Solicitation. The checklist must be followed. The County may consider proposals non-responsive for any items or deadlines not met as listed below.

1. Read the document fully.
2. Submit **Form A. BID/Solicitation Participation Acknowledgement** to Meckbids@mecklenburgcountync.gov.
3. Refer to this **Schedule of Events** for dates, times and locations specific to the Solicitation.

DATE	Time (EST)	LOCATION/Submittal Requirement	EVENT
7/27/2023	N/A	MECKProcure	Issue Solicitation Notice
8/09/2023	Before 2:00pm	Meckbids@mecklenburgcountync.gov	Form A. BID/Solicitation Participation Acknowledgement Forms Due
8/10/2023	2:00pm	<ul style="list-style-type: none"> • Location: DSS Kuralt Centre 301 Billingsley Road Room: Mecklenburg A Charlotte, NC 28211 • Microsoft: Click here to join the meeting <ul style="list-style-type: none"> ○ Meeting ID: 253 151 082 176 ○ Password: fkNVbv • Call in (audio only) <ul style="list-style-type: none"> ○ Phone Number: 704-672-5181 ○ Conference ID: 543 802 311# 	Pre-Proposal Conference
8/11/2023	Before 2:00pm	Meckbids@mecklenburgcountync.gov	Vendor Questions Due
8/17/2023	Before 2:00pm	MECKProcure	Post County Response to Vendor Questions
8/23/2023	2:00pm	Vendor Registration Form for Training	Vendor Registration and Submittal Training
8/30/2023	Before 2:00pm	All proposals shall be submitted online via MECKProcure	Proposals Due
9/22/2023	TBD	TBD	Short List Interviews for Selected Vendors

Note: Mecklenburg County reserves the right to adjust this schedule as it deems necessary.

4. **Proposal Format** - The following items must be submitted in the following order at the time of proposal submission. Vendors are encouraged to check off each item as the required action is completed:

- Section 3.1 - Letter of Transmittal
- Section 3.2 - Executive Summary
- Section 3.3 - Statement of Work
- Section 3.4 - Pricing
- Section 3.5 - Insurance
- Section 3.6 - Permits and/or Licenses, if applicable
- Section 3.7 - Audited Financial Statement, not required for this solicitation
- Form B, Pricing Worksheet
- Form C, Contract Exceptions Form
- Form D, Addenda Receipt Confirmation
- Form E, Vendor Company Information - Background and Experience Form
- Form F, Vendor Reference
- Business Diversity & Inclusion (BDI) Forms
 - Attachment 1: BDI Solicitation Coversheet
 - Attachment 2: BDI Form B – Identification of Subcontractor Participation
 - Attachment 3: BDI Form C – Statement of Intent to Perform Contract with OWN Workforce
 - Attachment 4: BDI Form D – MWBE Inclusion Plan

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1. Introduction

1.1. Objective

Mecklenburg County, through its Department of Community Resources (DCR) located in the State of North Carolina, is seeking Bids/Proposals from qualified vendors to provide/perform Work First Kinship Services.

Background

The majority of Work First children in the program are being cared for by their grandparent or great grandparent who are unable to assist with homework, class projects, career, and college exploration. Furthermore, generational poverty decreases a student's opportunity to recognize or have exposure to financial literacy development.

Mecklenburg County is seeking Vendors to submit proposals to provide career enrichment, tutoring and mentorship for Work First and Youth and Family Services students to equip students with essential learning skills to make improvements in math, English and reading and end of grade testing results. Funding sources to implement the services are Federal, State, and local.

Vendors may submit a proposal for performance of all target groups or for a specific target group as listed below:

- 3rd-5th Reading Development
- 6th-8th Middle School Financial Literacy
- 9th-12th High School Educational and Career Development
- 8th-12th Supportive Cultural Services for Spanish Speaking students (Bilingual Pathways)

Contract

Award of a Contract will be made to 1 or more vendors on a competitive basis following the process, terms and conditions as described in this Solicitation.

Contract will be for a term of 1 year, with option to renew for a minimum of 2 additional consecutive 1-year terms thereafter unless earlier terminated pursuant to the terms and conditions of the Contract.

Vendors shall provide pricing based on the requirements. The proposed cost shall remain in effect for the duration of the Contract which includes the initial term and 2 additional consecutive one 1-year terms.

1.2. Business Diversity & Inclusion (BDI) Program

It is the practice of the Mecklenburg County's Business Diversity and Inclusion Program (the "BDI Program"), in conjunction with the County Procurement Division, to foster greater competition, increase opportunities for participation by all segments of the business community, and maximize value for the taxpayers' dollars through efficient use of public funds.

The BDI Program accordingly is intended to promote full and equal business opportunities for all businesses contracting with Mecklenburg County by increasing the opportunity for purchase of goods and services from minority-owned and women-owned enterprises.

The [BDI Program Provisions Guide](#) details requires Contractors and Subcontractors to take all reasonably necessary steps to ensure maximum inclusion opportunity for the participation of Minority-owned, Women-owned, and Small Business Enterprises (collectively "MWSBE"), herein referred to as MBE, WBE or MWBE firms as well as other responsible vendors with fair and reasonable opportunity to participate in conducting business with Mecklenburg County.

1.3. Mecklenburg County Rights and Options

- County may in its discretion require one or more vendors to make presentations to the evaluation team or appear before management and/or its representatives for an interview.
- During such interview, the vendors may be required to orally and otherwise present its proposal and to respond in detail to any questions posed. Additional meetings may be held to clarify issues or to address comments, as deemed appropriate.

- Vendors will be notified in advance of the time and format of such meetings. Since Mecklenburg County may choose to award a Contract without engaging in discussions or negotiations, the proposals submitted shall define the vendors best offer for performing the services described in this Solicitation.
- The commencement of such discussions, however, does not signify a commitment by County to execute a Contract or to continue discussions. County may terminate discussions at any time and for any reason.
- County will decide which proposal best meets the criteria outlined in the Solicitation.
- County reserves the right to waive any minor informalities or irregularities, which do not go to the heart of the proposal or prejudice other offers, or to reject, for good and compelling reasons, any and all proposals submitted.
- Should vendors find discrepancies or omissions in this Solicitation, or any other documents provided by Mecklenburg County, the vendors should immediately notify the County of such potential discrepancy in writing via email as noted above, and a written addendum will be made available, if the County determines clarification necessary.
- Vendors are encouraged to make a good faith effort to include environmental considerations supporting waste reduction, recycling and buy-recycled products supporting markets for recycled and other environmentally preferable products whenever practical.
- County has [Solicitation Terms & Conditions](#) posted on the internet site which speaks to non-discrimination and equal opportunity. The County seeks to ensure that all segments of the business community have access to supplying the goods and services needed by County programs. The County affirmatively works to encourage utilization of minority business enterprise in procurement activities and provides equal opportunity for all businesses and does not discriminate against any vendor regardless of race, color, religion, age, sex, and national origin or disability.
- County reserves the right to reject any and/or all proposals in connection with this project, and to waive formalities in the proposal during any step of the procurement or awarding process (even after negotiations have begun).
- Final award of Contract is contingent upon availability of funds from Federal, State and/or local governing bodies.

2. Solicitation Process

2.1. Pre-Proposal Conference

- A **Non-Mandatory** Pre-Proposal Conference will be conducted according to the **Schedule of Events**. While attendance at the Pre-Proposal Conference is not mandatory, all interested vendors are encouraged to attend.
- If special accommodations are required for attendance, please notify the County representative indicated herein in advance of the date and time above and identify the special accommodation(s) required.

2.2. Submission of Responses

- Responses must be submitted electronically via www.meckprocure.com.
- Responses sent by fax, email or flash drive will not be accepted.

2.3. Proposal Opening

- As required by North Carolina General Statute 143 – 131 according to type of Solicitation:
 - Procurement staff will open the proposals received after the Due Date.
 - Proposals will not be read aloud or made available to inspect or copy until any trade secret issues/proprietary and/or confidential information has been resolved and a Contract has been awarded.
 - Public Bid Opening required for Federally funded projects.

2.4. Evaluation

The standard of award will be based on the most comprehensive, competitive and best value solution for the County based on 100-point scale for the following criteria/weights, the County reserves the right to modify the evaluation criteria or waive portions thereof:

- **Qualification and Experience. 40%**
 - Vendors will be evaluated based upon their understanding, experience and qualifications in performing the same or substantially similar services, as reflected by its experience in performing such services and approach for the provision of the Services.
- **Project Approach. 35%**
 - This criterion includes an evaluation of the financial qualifications of the vendor
- **MWBE Achievement Goals. 15%**
 - Under this criterion, proposals will be compared in terms of supplies and/or services to be provided by MBE and WBE Subcontractors to meet the achievement goals for the project as listed on Attachment 1 – BDI Solicitation Coversheet.
- **Cost Effectiveness and Value. 10%**
 - Under this criterion, proposals will be compared in terms of the most reasonable, and or most effective pricing options.
- **Acceptance of the Terms of the Contract.**
 - The County will evaluate the proposals for compliance with the terms, conditions, requirements, and specifications stated in this Solicitation including the Sample County Contract referenced in Section 2.5 Contract listed below. Vendors shall provide pricing based on the requirements and terms set forth herein.
- **Interviews.**
 - Interviews may be conducted with vendors at the sole discretion of the County. Any costs associated with interviews is the sole responsibility of the vendor.

2.5. Contract

- Should there be exceptions to the Contract, list them in **Form C. Contract Exception**.
- Please refer to the Sample County Contract ([click here to view](#)).
 - If your legal counsel needs to review the Sample County Contract for potential issues, the review must be completed prior to submitting a proposal.

3. Proposal Content and Format

3.1. Letter of Transmittal

The proposal must include a cover letter of transmittal attesting to its accuracy, signed by an individual authorized to execute binding legal documents on behalf of the vendor.

- The cover letter shall provide the name, address, telephone and facsimile numbers of the vendor along with the name, title, address, telephone and facsimile numbers of the executive that has the authority to Contract with County.
- Each vendor shall make the following representations and warranty in the cover letter, the falsity of which might result in rejection of its proposal: **“The information contained in this proposal or any part thereof, including any exhibits, schedules, and other documents and instruments delivered or to be delivered to County, is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead County as to any material facts.”**
- The cover letter must include any trade secret issues/proprietary and/or confidential information.

3.2. Executive Summary

A summary describing the vendor’s understanding of the County’s requirements/specifications and the proposed solution.

- A proposed total cost for the project.
- A brief summary of the proposed total cost.
- A summary of the approach to be undertaken to perform the services.
- Highlights any superior or unique aspects of the proposal.
- If applicable, identification of the proposed project team (including responsibilities).
- If you wish to add supplemental information, please be sure the additional attachment(s) is labeled “Supplemental Information.”

3.3. Statement of Work

Vendors must submit a Statement of Work to demonstrate competency in performing services as defined in this Solicitation. Statement of Work, must include at a minimum the following:

- **Qualification**

- Provide a brief history and overview of your company.
- Describe any hands-on experience the owner/manager and each staff has had providing the services.
- Provide the following information for the years 2021 and 2022, fiscal or calendar year (12 months):
 - Describe the types of services you provide.
 - On average for a typical month, the number of students receiving academic tutorial and/or educational enrichment activities.
 - Number and type of staff to meet customer needs, list full time and part-time for each category.
 - List all revenue sources, including private pay customers, Medicaid, insurance companies, other contracts, and other revenue sources.
 - Provide an organizational chart listing job titles with individual names, and job descriptions of key individuals who will be assigned to work with DSS.
 - Job descriptions should be specific to the project.
- Describe your company's criteria for recruiting, hiring, and evaluating staff.
 - What are minimum qualifications, experience, and background checks required for each of these positions?

- **Experience**

- Describe your agency's:
 - Supervision of staff.
 - Procedure/process in maintaining confidentiality of both paper and electronic customer records.
 - Procedure/process in engaging students and family members, curricula and other materials used to provide tutorial services to students.
 - Curricula or program for increasing academic performance and overall student performance and behaviors.
 - Unique strengths of your company and how it can provide the best service for this project.

- **Project Approach**

Vendors must identify if they are submitting a proposal for all target groups or for a specific target group as listed below. Include the total number of students to be served by target group for a minimum number of 25 to 75 students per target group

- 3rd-5th Grade Reading Development:
 - Describe how your agency will conduct placement and testing for 3rd-5th Grade per school year.
 - Identify how you will determine appropriate levels and goals.
 - How will students be measured for comprehension improvement.
 - Describe the tool your program intends to utilize to collect pre and post information? Is the tool identifiable as an evidence-based practice?
 - ❖ Is it culturally sensitive and bilingual for Spanish speaking students?
 - Describe any and all software and classroom materials provided by your program and attach curriculums.
 - Highlight training qualifications of staff expected to deliver program interventions.
 - Benchmark assessment must occur three times per school year for all students, and more frequent progress monitoring should occur for those at-risk students.
 - Describe how this project will be evaluated and how you will assess the achievement of these objectives. Lastly, describe the process to be utilized for ensuring that data is reported timely and promptly to ESD/DCR.
 - Program Timeframe
 - ❖ How many weeks will the program be offered?
 - ❖ What days of the week and times (start and end) program will be offered?
 - ❖ Where will the program take place? Include physical address of building.
 - ❖ What will the student -to-teacher ratio be?

- 6th-8th Middle School Financial Literacy:
 - Indicate where programming will take place and how your agency will address transportation needs for students.
 - Explain how your program will meet the requirement of providing financial education.
 - Provide information on previous financial literacy education services delivered to the targeted population provided by your agency and highlight any community partnerships utilized to assist.
 - Explain how offering your program to Work First students will impact the Mecklenburg community.
 - Provide information on how you will evaluate your program's success. Include:
 - What key quantifiable and qualitative numbers and information you will use to demonstrate success.
 - The method of verification of attendance and the method used to ensure students attain a mastery the material.
 - Description of the process to be utilized for ensuring that data is reported timely and promptly to ESD/DCR.
 - Program Timeframe
 - ❖ How many weeks will the program be offered?
 - ❖ What days of the week and times (start and end) program will be offered?
 - ❖ Where will the program take place? Include physical address of building.
 - ❖ What will the student -to-teacher ratio be?

- 9th-12th High School Educational and Career Development
 - Develop educational and career interventions to provide students with real-life onsite work experiences where students can apply academic/technical skills and develop employability skills.
 - Proposals should seek to clearly highlight interventions from the strategies below:
 - Apprenticeship or pre-apprenticeship partnerships,
 - Integrated college prep and career training engagement with local community college programs,
 - Current attendance and at-risk for drop out monitoring relationship with Charlotte Mecklenburg Schools,
 - Any planned virtual learning or on-site skill enhancement opportunities, and
 - Charlotte Bridge program transition support.
 - ❖ Identify how the program aligns with the skill needs of industries in the economy of the State of North Carolina or regional economy involved?
 - ❖ How does the program prepare a student to be successful in any of a full range of secondary or postsecondary education opportunities, including a work-based apprenticeship?
 - ❖ Does your program include counseling to support an individual in achieving the individual's education and career goals (such as job shadowing and/or organized college tours)?
 - Does your program help a student enter or advance within a specific occupation? Describe any ongoing relationship and/or commitment from local employers representing the fastest growing jobs in North Carolina. Lastly, describe the process to be utilized for ensuring that data is reported timely and promptly to ESD/DCR.
 - Propose at least one outcome, but no more than two that will be achieved as a result of this project. Outcomes are changes in knowledge, skills, or behavior.
 - For each outcome, propose at least one, but no more than five evaluations, measurements or tools that will determine the level of success in achieving the outcome.
 - For each outcome, list at least one, but no more than seven specific methods, activities, or services to be implemented to achieve the outcome.

- Identify transportation services being delivered to transport students to and from activities. Included such items as bus rentals, fuel for vans, and/or driver services within budget proposal.
 - Program Timeframe
 - How many weeks will the program be offered?
 - What days of the week and times (start and end) program will be offered?
 - Where will the program take place? Include physical address of building.
 - What will the student -to-teacher ratio be?
- 8th-12th Supportive Cultural Services for Spanish Speaking students (Bilingual Pathways)
- The objective for the pathway is to develop educational and career interventions for students that are intentional about addressing upward mobility opportunities and is culturally relevant to Spanish speaking students.
- Describe how your program meets the cultural sensitivity needs of Spanish speaking students and organizes education, training, and other services that supports educational and career advancement?
 - Proposals should seek to clearly highlight interventions from the strategies below:
 - Apprenticeship or pre-apprenticeship partnerships,
 - Integrated college prep and career training engagement with local community college programs,
 - Current attendance and at-risk for drop out monitoring relationship with Charlotte Mecklenburg Schools,
 - Any planned virtual learning or on-site skill enhancement opportunities, and
 - Charlotte Bridge program transition support.
 - ❖ Identify how the program aligns with the skill needs of industries in the economy of the State of North Carolina or regional economy involved?
 - ❖ How does the program prepare a student to be successful in any of a full range of secondary or postsecondary education opportunities, including a work-based apprenticeship?
 - ❖ Does your program include counseling to support an individual in achieving the individual's education and career goals (such as job shadowing and/or organized college tours)?
 - Does your program help a student enter or advance within a specific occupation? Describe any ongoing relationship and/or commitment from local employers representing the fastest growing jobs in North Carolina. Lastly, describe the process to be utilized for ensuring that data is reported timely and promptly to ESD/DCR.
 - Propose at least one outcome, but no more than two that will be achieved as a result of this project. Outcomes are changes in knowledge, skills, or behavior.
 - For each outcome, propose at least one, but no more than five evaluations, measurements or tools that will determine the level of success in achieving the outcome.
 - For each outcome, list at least one, but no more than seven specific methods, activities, or services to be implemented to achieve the outcome.
 - Identify transportation services being delivered to transport students to and from activities. Included such items as bus rentals, fuel for vans, and/or driver services within budget proposal.
 - Program Timeframe
 - How many weeks will the program be offered?
 - What days of the week and times (start and end) program will be offered?
 - Where will the program take place? Include physical address of building.
 - What will the student -to-teacher ratio be?

- **Format for submission:**
 - File size not to exceed 2MB
 - Single-spaced pages
 - One-inch margins
 - Font Times New Roman, size 12

3.4. Pricing

- Pricing will include all aspects of the project.
- Pricing will include travel at the [IRS Per Diem](#) rates for Charlotte NC.
- Any costs incurred in the process of preparing and/or submitting a proposal shall be borne by the proposer.

3.5. Insurance

- Evidence of adequate insurance or ability to obtain insurance must be include in the bid/response.
- Provide one of the following documents for the required insurance minimums marked below:
 - A Certificate of Insurance.
 - A signed and dated letter from your insurance provider on their company letterhead stating your ability to obtain coverage.
 - Mecklenburg County must be listed as Certificate Holder on the accord.
 - Commercial General Liability**
 - Minimum \$1,000,000
 - Mecklenburg County must be listed as additionally insured.
 - Automobile Liability**
 - Minimum \$1,000,000
 - Professional Errors & Omissions**
 - Minimum \$1,000,000
 - Worker's Compensation and Vendors Liability**
 - State of North Carolina statutory requirements
 - If less than three (3) employees (including the owner(s), provide signed statement on business letterhead that Worker's Compensation not required and state the number of full-time and part-time employees including owner(s)
 - Sexual Abuse and Molestation**
 - Minimum \$1,000,000

3.6. Permits and/or Licenses – if applicable

Must procure all necessary permits and licenses and abide by all applicable laws, regulations and ordinances of all Federal, State, and local governments in which work under any resulting Contract is performed.

3.7. Audited Financial Statement – not required for this solicitation

- Audited Financial Statement must meet the definition as outlined in the [Audited Financial Statement Requirements](#)
- Must be prepared by an independent Certified Public Accountant.
- The year-end date for the financial statement must be within the past twelve (12) months.
- Submit Audited Financial Statement along with proposal response.
- If Audited Financial Statement is not submitted with proposal response:
 - Your CPA must submit a letter stating the Audited Financial Statement will be finalized and submitted within thirty (30) calendar days after the Proposal due date as identified on the **Schedule of Events**.
 - Letter must be signed and on CPA letterhead.
- The Audited Financial Statement and all correspondence related to the requirement must be sent to Veronica.Uche@mecklenburgcountync.gov.
 - Do not upload in MeckProcure.

3.8. BDI Program Forms

Bidders are expected to review the entire [BDI Program Provisions Guide](#) BDI Solicitation Coversheet as they are planning to submit the following BDI forms with their Bid/Proposal.

- BDI Solicitation Coversheet

- BDI Forms B – Identification of Subcontractor Participation
- BDI Form C – Statement of Intent to Perform Contract with OWN Workforce
- BDI Form D – MWBE Inclusion Plan with Bid/Proposal

The BDI forms are referenced as “*Attachments*” to this solicitation and are required forms.

4. Digital Accessibility Compliance

Mecklenburg County has a Digital Accessibility Policy related to all public-facing digital communications initiatives. The policy supports Mecklenburg County’s goal of providing equal access to all members of the public and complying with all applicable digital accessibility laws. Mecklenburg County has obligations under laws including (but not limited to): The Americans with Disabilities Act of 1990 (or “ADA”, 28 CFR Parts 35 and 36), Section 508 of the Rehabilitation Act of 1973 (or “Section 508”, 36 CFR 1194).

This policy should be used when procuring third-party products, components or services related to the “public-facing digital communications” that are considered to be in scope for accessibility compliance and defined as:

- **Mobile Websites and Applications:** Mobile optimized websites and native applications (e.g., iOS®, Android®) that can be used by the public to interact with any services offered by Mecklenburg County.
- **Websites & Social Media:** Websites and digital content (HTML or non-HTML) that can be accessed by the public via internet browser or social media platform (e.g., Facebook, etc.).
- **Other Public Facing Websites:** Other Mecklenburg County public-facing sites such as: E-Parks, EastwayRec.com, and other department websites.
- **Any other digital communications** effort towards public recipients.

To ensure compliance with this policy, a [Voluntary Product Accessibility Template \(VPAT\)](#) must be submitted to Public Information’s Web Services Manager prior to any product public implementations.

5. Vendor Support

5.1. Vendor Registration and Training

Must be completed prior to response submission but is not required to access the Solicitation documents.

- See www.meckprocure.com to:
 - Register as a vendor, click on Register located on the left side of the page.
 - To access bid documents, click on Public Access located on the left side of the page.
- Training regarding Vendor Registration and Electronic Bid Submission will be provided by the Vendor Management Program Office. The training will assist with registration and electronic bid submission.
 - To participate in the training, you must [Register for training](#).
 - Confirmation of the scheduled training along with details will be forwarded to the registrant.

5.2. National Institute of Governmental Purchasing Codes (NIGP)

- NIGP Code is a universal taxonomy for identifying commodities and services in procurement systems.
- Define the code for the requested good/service.

6. Scope of Work

6.1. Project Overview

Vendor will design and implement an academic enrichment support program for Mecklenburg County’s Work First and Youth and Family Services students to reach their fullest educational and academic potential in reading, math, English, financial literacy, and career development.

- Project Target Groups
 - 3rd-5th Reading Development
 - 6th-8th Middle School Financial Literacy
 - 9th-12th High School Educational and Career Development
 - 8th-12th Supportive Cultural Services for Spanish Speaking students (Bilingual Pathways)

- Project Goals
 - Improve career and/or college preparation opportunities
 - Improve overall academic performance in math, reading, and English
 - Improve school attendance
 - Improve upward mobility pathways via exposure to career training, skill development, and secondary educational supports
 - Increase students' exposure to cultural enrichment activities, such as art, career development and life skills
 - Improve End of Grade (EOG) test scores for students in grades 3rd – 8th
 - Improve graduation rate of Work First students

6.2. Specifications/Qualifications

The Vendor must meet the following criteria:

- Experience in the listed categories of [Tier 1 Work First Services](#):
 - Educational and Career Awareness/Development
 - Academic Tutorial
 - Career Training Supports (shadowing, internships, exploration)
 - College Enrollment Prep
 - Mentoring
 - Financial Literacy
 - Summer Enrichment
- Possess all required North Carolina licenses, where applicable, as well as appropriate County licenses, and shall comply with all laws, ordinances, and regulations applicable to the Services for which it is contracting.
- Capacity to serve residents throughout all of Mecklenburg County.
 - Have the ability to provide services up to 8 hours/5 days per week which may include weekends (Holidays observed are New Year's Day, Martin Luther King Jr. Day, Good Friday, Memorial Day, Independence Day, Labor Day, Thanksgiving, and day after, and Christmas (one day before or after Christmas) anywhere within Mecklenburg County.

6.3. Deliverables (service levels, reporting, milestones, etc.)

Vendor shall:

- Serve all families utilizing the [2-Gen Approach](#) to intentionally and simultaneously working with children and the adults in their lives to create a legacy of educational success and economic prosperity that passes from one generation to the next.
- Work with the DCR Kinship Social Workers in collaboration with Kinship/Caregiver community agencies to meet identified needs of the students/families that cannot be met internally by the Vendor.
 - Financial literacy,
 - Therapeutic counseling,
 - Leadership skills,
 - Mentoring,
 - Child and dependent care resources,
 - Housing,
 - Educational supports,
 - Internship opportunities, and
 - Introduction to basic and essential career skills training.
- Assess students for comprehensive engagement and retention into an identified career and/or educational pathway based on the below grades and developmental goals that facilitates growth, development, and performance achievement for K-12 household recipients of Work First benefits.
 - 3rd-5th Grade Reading Development:
 - Determine appropriate reading levels and goals.
 - Measure for pre and post comprehension improvements

- 6th-8th Middle School Financial Literacy:
 - Help students grasp a basic understanding of money in their daily lives.
 - Develop students' skills in the four fundamental pillars of money: debt, budgeting, savings and investing.
- 9th-12th High School Educational and Career Development
 - Develop educational and career interventions to provide students with real-life onsite work experiences where students can apply academic/technical skills and develop employability skills.
- 8th-12th Supportive Cultural Services for Spanish Speaking students (Bilingual Pathways):
 - Develop educational and career interventions for students who are intentional about addressing upward mobility opportunities culturally relevant to Spanish speaking students.
- Reporting Requirements

Perform Benchmark assessment three times per school year for all students, and more frequent progress monitoring should occur for those at-risk students (i.e., students with behavioral issues, poor academic performance, attendance issues and those who have been expelled or attending alternative schools.

 - **Data and benchmarks to be tracked by vendor**
 - # Of families who are referred to the program
 - Number of referrals per family
 - # Of youth served per family
 - Client data for academic performance and attendance
 - Demonstration of improved metrics in client data measured in 90-day increments
 - # Of participants for each offered service
 - Outcomes for participants after the completion of program trainings and enrichment activities

Form A. BID/Solicitation Participation Acknowledgement

This form is to acknowledge that you are interested in participating in this project and that you have read/reviewed the County Sample Contract that will be used upon award. Failure to submit this form by the designated date as identified on the Schedule of Events shall not preclude the Company from submitting a proposal.

- Please complete and submit this form to the email address: Meckbids@mecklenburgcountync.gov.
- In the Subject Line include Attention: Work first Kinship Services #487-DL-DCR004005A Demetrius Littlejohn, Procurement Analyst

AGENCY CONTACT INFORMATION			
Name:		Phone:	
Fax:		Email:	

AGENCY INFORMATION		
Agency Name:		
Name:	Title:	
Address:		
City:	State:	Zip Code:
Business Designation (check One)		
Individual [<input type="checkbox"/>]	Sole Proprietorship [<input type="checkbox"/>]	Public Service Corp [<input type="checkbox"/>]
Partnership [<input type="checkbox"/>]	Corporation [<input type="checkbox"/>]	Government/ Nonprofit [<input type="checkbox"/>]
LLC [<input type="checkbox"/>]		

Please check the appropriate box and provide the requested information:

- Yes No **Will attend the Pre-Proposal Conference and will submit a Proposal**

Number of attendees: In-Person Via Teleconference
- Yes No **Will not attend the Pre-Proposal Conference; however, intend on submitting a Proposal**

Reason:
- Yes No **Will not attend the Pre-Proposal Conference nor submit a Proposal**

Reason:

Form B. Pricing Worksheet
Line-Item Budget and Budget Narrative

Line-Item Budget Category	Amount
A. Direct Program Expenses	
1.	\$
2.	\$
3.	\$
4.	\$
B. Indirect Program Expenses	
1.	\$
2.	\$
3.	\$
4.	\$
C. Administrative Expenses (cannot exceed 4% of entire budget)	
1.	\$
2.	\$
3.	\$
4.	\$
Annual Budget Total	\$

Line-Item Budget Narrative (Please provide a brief description of the line-item budget categories listed above)

A. Direct Program Expenses:

1. (Enter category and description)
2. (Enter category and description)
3. (Enter category and description)
4. (Enter category and description)

B. Indirect Program Expenses:

1. (Enter category and description)
2. (Enter category and description)
3. (Enter category and description)
4. (Enter category and description)

C. Administrative Expenses:

1. (Enter category and description)
2. (Enter category and description)
3. (Enter category and description)
4. (Enter category and description)
5. (Enter category and description)

Additional Comments:

Form D. Addenda Receipt Confirmation

Instructions: Please acknowledge receipt of all addenda posted to [MECKProcure](#) by including this form with your Proposal.

ADDENDUM #:

DATE REVIEWED:

I certify that this proposal complies with the General and Specific Specifications and conditions issued by Mecklenburg County except as clearly marked in the attached copy.

(Please Print Name)

Date

Authorized Signature

Title

Company Name

Form E. Vendor Company Information - Background and Experience

Vendor Background	
Question	Response
Vendor Identification	
Vendor Legal Name:	
Vendor Assumed or DBA Name:	
Vendor Address:	
Vendor Contact Information:	
Corporate Notes	
Ownership:	
State company ownership status <ul style="list-style-type: none"> • Business • Sole Proprietor • Partnership • Corporation • Limited Liability Corporation (LLC) • Other 	
State what city and state the company was legally formed.	
State the date the company was formed.	
Certified Partnerships:	
Identify certifications held for implementing another firm's products. Include how long the partnership or certification has been effect.	
Organization Size:	
Describe organization, including any parent companies, subsidiaries, affiliates and other related entities. <ul style="list-style-type: none"> • If a Subsidiary <ul style="list-style-type: none"> ○ # Of employees of proposing company/division ○ Identify revenues of proposing company/division 	
Vendor Experience	
Customer Base:	
# Of public sector clients.	
# Of clients that are municipalities/counties	
# Of clients served similar in size to the County	
Terminated Projects:	
List any terminated projects. Please disclose the jurisdiction and explain the reason for the termination.	
Litigation:	

List any litigation that you have been involved with during the past two (2) years regarding services provided.	
-----------------------------------------------------------------------------------------------------------------	--

Additional Narrative Response	
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Background:	
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Describe company in terms of size, type of services offered, and clientele served.	
------------------------------------------------------------------------------------	--

Describe track record for providing services and/or deliverables similar to the Scope of Work in the Solicitation.	
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Financial Information:	
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State whether the company or its parent company (if any) has ever received any sanctions or is currently under investigation by any regulatory or government body.	
--------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

Minority Women Business Enterprise (MWBE) Participation	
----------------------------------------------------------------	--

Provide a brief explanation of your company’s approach to internal diversity and inclusion. <ul style="list-style-type: none"> • Provide diversity in demographics within your organization • Provide community involvement with diverse stakeholders/organizations. 	
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

Briefly explain your company’s approach to utilizing NC Office of Historically Underutilized Businesses Minority and Women sub-firms and how they will contribute as part of the project team.	
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

Provide good faith information on previous projects, similar in scope and scale and the achieved diversity and inclusion on those projects.	
---------------------------------------------------------------------------------------------------------------------------------------------	--

Describe the project team key individuals responsible for performing the Statement of Work services and/or deliverables. <ul style="list-style-type: none"> • Provide resume with information regarding <ul style="list-style-type: none"> ○ Experience ○ Qualifications ○ Professional certifications/licensures ○ Other information as deemed necessary 	
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

Provide organizational chart, listing key individuals and responsibilities, including location of office(s). <ul style="list-style-type: none"> • A percentage/ratio of male to female employees and the percentage/ratio of minority employees within the prime consultant firm. You may also choose to provide other examples or types of diversity within the firm. • A percentage/ratio of male to female employees and the percentage/ratio of minority employees within the sub- firms. Sub-firms may also choose to provide other examples or types of diversity within their firms. 	
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

<ul style="list-style-type: none"> • Identify any MBE /WBE certified sub-firms included on your team, and identify which certification (M, W) those sub-firms have. • Any additional information you may have regarding any efforts on the part of the prime or sub-firms towards inclusion and diversity. This may include any professional agency or university outreach efforts, internship, or education programs, etc. 	
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

Communication	
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Describe communication scheme you will use to keep the County informed about services?	
----------------------------------------------------------------------------------------	--

What risks are associated with project? What contingencies have been built in to mitigate those risks?	
--------------------------------------------------------------------------------------------------------	--

Form F. Vendor Reference Form

Please provide the following information for three (3) customers of comparable size and scope as outlined in this Solicitation, particularly North Carolina public sector customers that the vendor has been under Contract with during the past five (5) years, as well as any additional municipality references.

References may be called at any time during the procurement process. The County will not notify Vendors before reference checks begin.

The County reserves the right to check any other reference(s) that might be indicated through the explicitly specified contacts or that result from communication with other entities involved with similar projects.

If your Bid/Proposal includes a Third-Party Provider, you must also submit a separate copy of this form for each Third-Party Provider.

REFERENCE 1:

Name of Client: _____ Phone: _____

Address: _____

Primary Contact: _____ Title: _____

Email Address: _____ Phone: _____

Service Dates: _____

Summary and Scope of Services Provided:

Client Operating Budget: \$ _____ Client # of Employees: _____

REFERENCE 2:

Name of Client: _____ Phone: _____

Address: _____

Primary Contact: _____ Title: _____

Email Address: _____ Phone: _____

Service Dates: _____

Summary and Scope of Services Provided:

Client Operating Budget: \$ _____ Client # of Employees: _____

REFERENCE 3:

Name of Client: _____ Phone: _____

Address: _____

Primary Contact: _____ Title: _____

Email Address: _____ Phone: _____

Service Dates: _____

Summary and Scope of Services Provided:

Client Operating Budget: \$ _____ Client # of Employees: _____

10/2018

Attachment 1: BDI Solicitation Coversheet

BUSINESS DIVERSITY & INCLUSION (BDI) PROGRAM PROVISIONS GUIDE

BDI SOLICITATION COVERSHEET

The County maintains a strong commitment to the inclusion of MWBEs in the County's contracting and procurement process. Accordingly, BDI provides information and forms that Bidders will supply to be considered for the Program.

Bidders are expected to review the entire BDI Program Provisions Guide and this BDI Solicitation Coversheet as they are planning to submit the BDI form(s) with their Bid/Proposal. The Bid/Proposal should outline any supplies and/or services to be provided by Subcontractors, including each certified Minority Business Enterprise (MBE) and Women Business Enterprise (WBE) for the Contract. Submittals (forms) and time frames can be referenced in Section-4.

PROJECT NAME: Work First Kinship Services – Solicitation # 487-DL-DCR-004005A

INDUSTRY CATEGORY

Architect & Engineering Construction Professional Services Other Services Goods

Review the established participation goal type selected with the below for this specific solicitation.

PARTICIPATION GOAL TYPES

A. CONTRACT-BY-CONTRACT GOALS

THE ESTABLISHED PARTICIPATION GOALS FOR THIS PROJECT ARE:

MBE WBE
Note: the goals must be achieved independently and not in combination

Required Bid forms associated with this participation goal type are:

- [Form A] Listing of Good Faith Efforts (GFE)
[Form B] Identification of Subcontractor Participation
Joint Ventures Documentation (include when is selected)

B. ACHIEVEMENT GOALS

THE ESTABLISHED PARTICIPATION GOALS FOR THIS PROJECT ARE:

11% MBE 4% WBE
Note: the goals must be achieved independently and not in combination

Required Bid forms associated with this participation goal type are:

- [Form B] Identification of Subcontractor Participation
[Form C] Statement of Intent to Perform Contract with Own Workforce
[Form D] MWBE Inclusion Plan
Joint Ventures Documentation (include when is selected)

C. SPECIAL PROJECTS

THE ESTABLISHED PARTICIPATION GOALS FOR THIS PROJECT ARE:

MBE WBE
Note: the goals must be achieved independently and not in combination

Required Bid forms associated with this participation goal type are:

- [Form D] MWBE Inclusion Plan
Joint Ventures Documentation (include when is selected)

**Attachment 2: BDI Form B – Identification of Subcontractor Participation
BUSINESS DIVERSITY & INCLUSION (BDI) PROGRAM PROVISIONS GUIDE**

Mecklenburg County Government

Formal Documents

Form B – Identification of Subcontractor Participation
[Submit with Bid]

The County maintains a strong commitment to the inclusion of MWBEs in the County’s contracting and procurement process when there are viable subcontracting opportunities. Bidders must submit this form with their Bid/Proposal outlining any supplies and/or services to be provided by all Subcontractors, including each MBE, WBE, and non-certified firms for the Contract.

Prior to submission, review your documents for accuracy and ensure all items are complete

Name of Bidder: _____ **Certification Status** MBE WBE NCSBE
(Company Name) (check all that apply): CBI-SBE NCDOT-DBE

Project Name: _____ **Solicitation #:** _____ **Total Bid Amount:** _____

Authorized Person: _____ **Telephone:** _____ **Email:** _____

I, the Authorized Person, do hereby certify that on this Contract, we intend to use the following certified **MWBEs** and non-certified firms as Subcontractors (subconsultants, vendors, suppliers, and/or providers of professional and/or other services). We intend to expend the amounts/percentages below of the total dollar amount of the contract with the businesses listed

****MBE and WBE Certification with the NCHUB Office is required to be counted toward participation goals.**

Total Utilization Amount	Total Utilization Percentage	Total MBE Amount	Total MBE Percentage	Total WBE Amount	Total WBE Percentage	Total Non-Certified Amount	Total Non-Certified Percentage

#	Firm Name / Contact Person	Telephone / Email	County / State	Scope of Work	MBE Amount	WBE Amount	Non-Certified Amount
1							
2							
3							
4							
5							
6							

Form D – MWBE Inclusion Plan

[Submit with Bid, when selected in the BDI Solicitation Coversheet]

Create a detailed description of the strategies and actions the Bidder will take to outreach fairly and equitably, support, and contract with MWBEs.

Prior to submission, review your documents for accuracy and ensure all items are complete

The following are elements to incorporate into the MWBE Inclusion Plan to help collaborate with MWBEs by addressing the following, but not be limited to:

- the firms you contacted, when, and how you made contact, and their contact information
- the outreach strategy used to meet this Contract’s MWBE achievement goals;
- the specific resources and resource contacts utilized to locate MWBE firms for this Contract;
- the plan for building a connection with MWBEs and developing a project team;
- the plan to strengthen business relationships;
- the methods that will be used to improve lines of communication;
- the approach(es) that will be taken to resolve disputes;
- detailed description of the supportive services and activities that will be established for business development and how the plan will be executed;
- the mentorship opportunities that will be made available and how those opportunities will be executed; and
- the efforts that will be made available for capacity building and how those efforts will be executed.

(add additional sheets if needed)

Primarily serving A/E/C (architectural, engineering, and construction) firms and educational institutions located in the Carolinas, Tennessee, and Georgia, we provide a meaningful vehicle for these entities to turn their creative ideas into narratives and branding that organically grow their revenue and build trust and loyalty with their customers.

Document Effective: 20220701 | Revised: XXXXXXXX