

RFP-26-ADWYO

ADDENDUM NO. 1

Questions & Answers

Adult, Dislocated Worker, & Youth Career Services and One-Stop Operator

Issued By: Upper Savannah Workforce Development Board

Administrative Entity: Upper Savannah Council of Governments

Release Date: March 3, 2026

This Addendum is hereby made part of RFP-26-ADWYO. The following questions were submitted by prospective bidders. Responses are provided below for clarification. All other terms and conditions of the RFP remain unchanged.

Page 4 – Participant Cost (30% Minimum)

Q: The RFP states a minimum of 30% must go toward participant cost and lists “Training, Supportive Services, Staff.” Please confirm whether “Staff” refers to staff delivering participant-facing services and how this is reconciled with the WBL minimum.

A: “Staff” refers exclusively to staff directly delivering participant-facing services (e.g., case management, career planning, eligibility determination, ISS development, WBL coordination and monitoring). Administrative, executive, or indirect staff do not qualify.

For Youth funds, the federal 20% Work-Based Learning (WBL) expenditure requirement must be met independently. Participant-facing staff time directly tied to development and monitoring of WBL placements may count toward the WBL calculation consistent with federal guidance. Both the 30% participant cost minimum and the 20% WBL minimum must be satisfied.

Page 5 – Oral Presentations

Q: May presentations be conducted virtually?

A:

Yes, if oral presentations are required, they may be conducted virtually at the discretion of Upper Savannah COG.

Page 6 – Contract Period / Start-Up

Q: Will start-up time be allowed during the contract period? If so, how long?

A:

Yes. Contractors may utilize reasonable start-up time within the July 1, 2026 – June 30, 2027 contract period for staffing and onboarding. Up to 60–90 days is generally considered reasonable, provided services begin as soon as practicable and performance targets remain achievable. Upper Savannah WDB would consider 30 days of start-up and transition time prior to July 1, 2026.

Page 7 – Partner Services in SC Works Centers

Q: Which services are expected to be provided by other partner organizations?

A: Current SC Works partners provide services including:

- SC DEW - Wagner-Peyser employment services, Veteran services, UI, Rapid Response, etc. (through the South Carolina Department of Employment and Workforce)
- Adult Education Programs (6 for the 7 Counties) - Adult Education and Literacy
- SCVR - Vocational Rehabilitation
- SC DSS - TANF and SNAP Employment & Training (where applicable)
- Job Corps – Referrals to Job Corps Services
- GLEAMNS – Community Development Block Grant programs

The awarded contractor will coordinate with partners but remains responsible for WIOA Title I Adult, Dislocated Worker, Youth, and One-Stop Operator functions outlined in the RFP.

Page 10 – Youth WBL Requirement (25% Recommendation)

Q: Is the 25% figure an additional minimum?

A: No. The federal requirement remains 20%. The 25% recommendation is a local planning buffer to ensure compliance.

Q: What costs count toward the WBL numerator?

A: Allowable WBL costs may include:

- Youth wages/stipends
- Employer-paid fringe (if reimbursed)
- Staff time directly establishing and monitoring WBL
- Supportive services directly tied to WBL participation
- Employer reimbursement for OJT (as allowable)

Youth Supportive Services

The Upper Savannah Workforce Region Supportive Services Policy 25-01 can be found at <https://upperscworks.com/workforce-system/staff-resources/py-2018-wioa-instructions/>.

Supportive services require:

- Enrollment in WIOA Youth
- Demonstrated financial need
- Documentation supporting necessity

Allowable categories include transportation, childcare, work attire, tools, testing fees, and emergency assistance (case-by-case). Local caps and limits are outlined in Policy 25-01. Supportive services directly tied to WBL may count toward the 20% WBL requirement consistent with federal guidance.

Assessments and Basic Skills Deficiency (BSD)

Q: When reusing an assessment from another program, what maximum time frame/age (i.e. ≤ 6 or ≤ 12 months) will the Board accept, and are there mandated assessment instruments (i.e. TABE, CASAS) for basic skills/MSG tracking for OSY.

A:

- Assessments ≤ 12 months old may be reused if appropriate and documented.
- Accepted assessments include TABE and CASAS.
- Remote testing may be allowed if administered under approved proctoring standards.
- BSD determination aligns with state-established cut scores (i.e. 8.9 Grade Level or less is considered BSD in Reading and/or Math)

Individualized Service Strategy (ISS)

Q: If a youth already has an Individualized Service Strategy (ISS) from another program, what criteria determine that it is “appropriate for use,” and what documentation must we retain to validate that determination?

A: An ISS from another program may be used as guide to shorten the intake process if:

- It reflects current employment and educational goals.
- It addresses WIOA Youth program elements.
- It is reviewed, updated as needed, and signed by WIOA staff and participant.

Documentation must reflect review and adoption. The ISS must be entered into the SC WOS Reporting system (SC mandated case management system).

Youth WBL Activity Types

Q: Please confirm that OJT, pre apprenticeship, internships, job shadowing, and summer employment all count toward WBL, and identify any local caps/limits per WBL activity type for youth.

A: The following count toward WBL:

- OJT

- Pre-apprenticeship
- Internships
- Job shadowing
- Summer employment

Currently Upper Savannah WDB allows up to 8 weeks for paid WBL activities.

Mentoring and Follow-Up

Q: Follow up must last ≥ 12 months after completion, adult mentoring must cover participation and a subsequent period totaling ≥ 12 months. Should we plan mentoring to run concurrently with or in addition to follow up, and should follow up expenses be budgeted as participant or staff costs?

A:

- Mentoring must total at least 12 months (during participation and/or post-exit).
- Follow-up services must last at least 12 months after exit.
- Mentoring may run concurrently with follow-up.
- Follow-up costs may be budgeted as staff or participant costs, depending on expenditure type.

Page 12 - SC Works Certification

Q: How long does it typically take to earn this certification? Is there an associated cost for which we should budget?

A: SC Works Certification is required once every three years in accordance with State Instruction 24-01. Please refer to State Instruction 24-01 for the checklist and criteria for certification. Upper Savannah Workforce Region was re-certified at the end of PY'24. Proposers should budget reasonable training and professional development costs for required partner training.

Facility Expectations

Q: Should the proposer add utilities to their budget to operate these centers? If yes, can you provide historical information on how much those costs run?

A: No, the Upper Savannah Workforce Board manages all the SC Works Center leases and associated facility costs.

Alternative Service Delivery Model

Q: If the Board closes the Abbeville, Edgefield, McCormick, and Saluda affiliate sites in May 2026, what are the required strategies to ensure youth access in those counties (i.e. mobile

units, partner site hours, pop up days), and will facility cost baselines in provider budgets be adjusted accordingly

A:

Abbeville, Edgefield, McCormick & Saluda Counties

The Upper Savannah Workforce Development Board has developed a structured Alternative Service Delivery Model to ensure continued access to comprehensive workforce services in Abbeville, Edgefield, McCormick, and Saluda Counties.

Community-Based Connection Points

The Board maintains established **SC Works Connection Points** in each county, hosted in libraries and other trusted community locations. These sites serve as recurring monthly “pop-up” access points where staff provide:

- Career coaching and eligibility determination
- Job search assistance and resume support
- Enrollment into WIOA Adult, Dislocated Worker, and Youth programs
- Employer referrals and hiring event promotion
- Supportive service coordination

This approach ensures consistent, predictable access within each county while maximizing community visibility.

Partnership with Piedmont Technical College

Through partnership with Piedmont Technical College, which maintains satellite campuses in each of the four counties, the Board secures:

- Space for scheduled onsite workforce services
- Classroom and meeting areas for orientations and workshops
- Designated locations to deploy the SC Works Mobile Unit

The SC Works Mobile Unit is scheduled for monthly onsite service days in each county, allowing for full-service enrollment, assessments, and individualized career planning.

Monthly Hiring Events

To ensure employer engagement remains strong in each county, the Board schedules monthly job fairs and hiring events rotating among the four communities. These events are coordinated in partnership with local employers and economic development stakeholders to align with regional hiring demand.

Youth Recruitment Strategy

The Board collaborates closely with regional Adult Education providers, whose staff welcome workforce representatives to attend monthly student orientations. This structured presence ensures direct outreach to eligible out-of-school youth and provides:

- Immediate screening for WIOA Youth eligibility
- Career pathway presentations
- Referrals into education and training programs
- Early connection to work-based learning opportunities

Access, Equity, and Continuity of Services

This Alternative Service Delivery Model ensures:

- Geographic equity across rural counties
- Regular, predictable in-person access
- Integration with education and training partners
- Strong employer engagement
- Cost-efficient use of federal resources

Through strategic partnerships, mobile service deployment, and community-based access points, the Upper Savannah Workforce Development Board maintains a robust workforce system presence in Abbeville, Edgefield, McCormick, and Saluda Counties despite changes to traditional affiliate site operations.

Page 13 - Youth Performance Measures (PY26)

Q: Please confirm the PY26 Youth performance measures and targets listed (Q2/Q4 placement in education/training/employment, median earnings, credential attainment, and MSG), and whether locally negotiated targets may be adjusted at contract execution.

A: PY'25 Youth Measures include:

- Q2 Employment/Education (75.0%)
- Q4 Employment/Education (75.0%)
- Median Earnings (\$4,500)
- Credential Attainment (69.5%)
- Measurable Skills Gains (MSG) (62.5%)

PY'26 WIOA Performance Metrics have not yet been negotiated and determined by SC DEW and U.S. DOL.

Credentials

Q: Which credentials count for the Youth credential measures (i.e. postsecondary diploma/cert, industry recognized short term credentials), and do they need to appear on a specific state approved list?

A: Credentials must meet WIOA definitions and include recognized postsecondary or industry-recognized credentials aligned with state-approved training providers and the Eligible Training Provider List (ETPL), where applicable. The SC ETPL list can be found at

<https://www.scpa.org/>.

Upper Savannah Workforce Regions Demand Occupational Areas are as follows.

- Healthcare
- Manufacturing & Production
- Transportation & Logistics
- Maintenance & Technical Trades
- Administrative & Office Support

Page 15 - Data Systems

Q: Can a proposer use their own CRM to track participant data, or is there a system we would be asked to use? If yes, will there be training on the system available to team members?

A: Contractors must record all results in the state case management system (SCWOS). Contractor staff is provided training on SC WOS by the Upper Savannah WDB Staff. Contractor-based CRMs may be used to track time, attendance, and vouchers but must include participant signatures (e-signatures are acceptable).

Insurance Requirements

Q: In addition to SCDEW's accident insurance for participants, what minimum general liability coverage levels must the Youth provider maintain, and are there additional insurance requirements for WBL/WEX worksites?

A: Successful Bidders will be required to submit a Certificate of Insurance showing their coverage for Commercial General Liability, Automobile Liability, Umbrella, etc. WIOA Participants engaged in training and/or WBL activities that are unpaid or paid via a stipend are covered by an SC DEW Blanket Accident Insurance Policy. WIOA Participants engaged on a paid Work Experience (earning a wage) are covered by Workers Compensation Insurance provided through the employer of record.

Page 16 - Monthly Invoices & Cost Allocation Plan

Q: Beyond the standard financial detail, what supporting documentation must accompany Youth monthly invoices (i.e. wage registers, participant support receipts, WBL agreements, employer attestations). Bidders must submit a cost allocation plan that explains how joint and shared costs are distributed across funding streams (i.e. Adult, Dislocated Worker, & Youth programs) and other federally funded activities." Is the budget document this cost allocation plan, or do we need to submit additional documentation?

A: Invoices may require:

- Wage documentation
- Supportive service receipts
- Attendance documentation
- Employer agreements
- Expenditure detail

Detailed guidance on the invoice process will be provided at award.

A detailed cost allocation methodology must be submitted separately unless fully incorporated into the budget narrative and clearly described.

SCWOS Data Entry Timeframes

Q: Please specify local timeframes for SCWOS data entry (eligibility, service entries, exits, MSG updates) and any local case note/quality standards beyond the SCWOS User Guide.

A: Local expectations include:

- Eligibility entered within 5 business days
- Services recorded real-time
- Timely exit documentation
- Real-time MSG documentation

A quality WIOA case note is a clear, factual, and compliant record of participant interaction, service delivery, and progress toward goals. It should tell the participant's story in a way that supports eligibility, performance outcomes, monitoring review, and potential audit.

For programs administered under the Upper Savannah Workforce Development Board, a strong case note should contain the following elements:

1. Basic Identifiers

- Participant name or ID number
- Date of contact/service
- Type of contact (in-person, phone, virtual, email)
- Staff name

2. Purpose of Contact

Clearly state *why* the interaction occurred. For example:

- Eligibility determination
- ISS/IEP development or update
- Follow-up
- Supportive service request
- Work-Based Learning monitoring
- Measurable Skills Gain documentation

This should align with the service entered in SCWOS (or applicable case management system).

3. Objective, Factual Information

Case notes must be:

- Objective (no personal opinions)
- Specific (avoid vague statements like "participant doing well")
- Professional in tone

Include:

- Barriers discussed
- Progress toward employment or education goals
- Attendance or training status
- Employer feedback (if applicable)

- Documentation received (pay stubs, transcripts, credential copies, etc.)

4. Assessment and Analysis

Demonstrate case manager engagement by documenting:

- Evaluation of participant progress
- Identification of new or ongoing barriers
- Determination of continued need for services
- Justification for supportive services

Example:

Participant reports reliable transportation has been restored; transportation assistance will be discontinued after this month.

5. Action Steps and Plan

Every strong case note should end with clear next steps:

- What the participant agreed to do
- What staff will do
- Timelines

Example:

Participant will submit mid-term grades by 3/15/26. Case manager will follow up in two weeks to document MSG progress.

6. Documentation Reference

If documentation was collected or reviewed, note it:

- "TABE post-test uploaded to file."
- "OJT timesheets verified for pay period ending 2/20/26."
- "Supportive service receipt reviewed and approved."

7. Compliance Indicators

For audit readiness, case notes should demonstrate:

- Eligibility justification
- ISS alignment
- WBL monitoring (if applicable)
- Supportive service necessity
- MSG verification
- Exit justification and follow-up attempts

If a decision is made (e.g., denial of service), the rationale must be documented clearly.

8. Timeliness

Case notes should be:

- Entered real-time with service delivery
- Detailed enough to stand alone
- Complete enough that another staff member could assume the case without confusion

What a Quality Case Note Should Achieve

A quality WIOA case note should:

- ✓ Justify the service provided
- ✓ Support performance outcomes
- ✓ Demonstrate active case management
- ✓ Withstand state or federal monitoring
- ✓ Provide continuity of care

Page 18 - Required Proposal Documents

Q: Can you indicate which of these will be required for the proposal?

A: The following must be submitted with the proposal:

- Federal ID number
- List of Board Members
- Certification of signatory authority
- Most recent audit or fiscal statement
- Cost Allocation Plan (if applicable)
- Indirect Cost Plan (if claiming indirect)
- Lobbying Certification
- Suspension and Debarment Certification
- Drug Free Workplace Certification
- Grievance Procedures

Remaining documents will be required prior to contract execution.

Indirect Costs & Profit

Q: Can a bidder without a negotiated indirect cost rate agreement utilize the federal de minimis rate to calculate indirect costs?

A: A bidder without a negotiated indirect cost rate agreement may elect to use the federal 10% de minimis rate under 2 CFR 200.414(f), if eligible. Any budgeted profit is negotiable and will be tied to performance benchmarks to be negotiated upon an award.

Page 19 - Staffing and Certification

Q: How many case managers are required for this contract? How long would team members have to obtain this certificate if they do not already possess it? Are there any other required staff positions and qualifications?

A: Case managers are expected to hold or obtain Career Development Facilitator (CDF) or Certified Workforce Development Professional (CWDP) certification within 12 months of hire. Staffing levels must be sufficient to meet enrollment and performance targets and should be justified in the proposal. At present there are five full-time staff.

Historic Service Levels (Approximate Annual Averages)

- Adult: 150–250
- Dislocated Worker: 75–125
- Youth: 100–150

Actual enrollment depends on funding levels.

Page 49 - Subcontracting

Q: If a Respondent subcontracts delivery of selected youth elements (i.e. specialized training, mentoring), what pre-award documentation must be included with the proposal (draft agreements, detailed budgets), and are there limits on the percentage of the Youth budget that may be subcontracted?

A: If subcontracting Youth elements:

- Provide draft scope of work
- Provide subcontract budget detail
- Include monitoring plan
- Ensure federal procurement compliance

There is no fixed subcontracting percentage cap; however, the prime contractor retains full responsibility for performance and compliance. The limit is the state Youth Budget Level.

Proposal Binding

Q: Do the proposals need to be in 3 ring binders or can they be simply bound with a binder clip?

A: Binding with a binder clip is acceptable.

End of Addendum No. 1