

REQUEST FOR PROPOSALS
Services Delivered to the City of Philadelphia Office of the Managing Director

Issued by:

The Mayor's Fund for Philadelphia
On behalf of The City of Philadelphia, Office of the Managing Director

Questions about this RFP should be submitted to mayorsfund@phila.gov and zakiyyah.ali@phila.gov by January 24, 2018.

Proposals must be received no later than 5:00PM Philadelphia, PA, local time, on January 26, 2018. A pdf version of the proposal must be emailed to: mayorsfund@phila.gov and zakiyyah.ali@phila.gov.

Introduction- Statement of Purpose

The Mayor's Fund for Philadelphia and the Office of the Managing Director (MDO) seek a qualified professional firm or individual contractors to provide case management and job placement services to participants in the City's Career Pathway Programs. These programs are part of a new *City as Model Employer* initiative, and will address barriers to securing and retaining permanent, full-time employment by connecting participants to supportive services through the provision of case management.

Department Overview

The Managing Director's Office (MDO), led by Michael DiBerardinis, oversees the City's operating departments. The MDO provides support, assistance, and coordination, both within and across departments, to ensure that quality services are delivered to the public efficiently and effectively every day. The MDO also develops and implements key policy initiatives to advance Mayor Kenney's agenda to increase equity, access and opportunity for all; oversees departments' performance and progress; catalyzes cooperation and collaboration across departments and with public and private partners; and houses significant, public-facing services.

The Mayor's Fund for Philadelphia (the Fund) works in close partnership with the City of Philadelphia and private sector partners to develop and lead initiatives that reflect Mayoral priorities and seek to improve the quality of life for all Philadelphians. The Fund will serve as the fiscal administrator for this contract opportunity. The Office of the Managing Director (MDO) will serve as the project manager for this effort on behalf of the Fund.

Project Background

As one of the largest employers in Philadelphia, City government intends to lead by example in providing high quality professional development opportunities that prepare, retain, and promote a diverse workforce. MDO intends to assist participants in Career Pathway and Workforce Readiness Programs in addressing barriers to securing and retaining permanent, full-time employment through access to supportive services via case management. This effort is part of a new initiative, City as Model Employer.

Currently, there are 10 Career Pathway Programs affiliated with this initiative and approximately 200 enrolled or soon-to-be enrolled participants. However, not all programs will receive direct case management services and job placement support. The estimated number of participants designated to receive direct case management service is 80. The number of total participants receiving direct case management service may vary as minimal decreases in headcount is anticipated due to general attrition. Group-based information sessions and communications that connect participants to broadly-applicable supportive services are to be made available to all participants associated with the 10 Career Pathway Programs.

All Applicants must be prepared to begin conducting initial intake assessments and providing direct case management services to participants in mid February 2018.

Contract Term

The contract will be for a partial year term of 29 weeks beginning February 12, 2018 and concluding August 31, 2018. The time period of September 1-14, 2018 is designated solely for the submission of final reports, invoices, and payment, provided all contract terms and conditions have been met; direct service will not be provided during this time. The contract will be renewable for up to (2) additional one-year terms based on performance and funding availability.

General Disclaimer of the City

This RFP does not commit the Fund or the City of Philadelphia to award a contract. This RFP and the process it describes are proprietary to the Fund and the City and are for the sole and exclusive benefit of the Fund/City. No other party, including any Applicant, is intended to be granted any rights hereunder. Any response, including written documents and verbal communication, by any Applicant to this RFP, shall become the property of the Fund/City and may be subject to public disclosure by the Fund/City, or any authorized agent of the Fund/City.

Scope of Work

The objectives for this project are to contract with qualified firms or individual contractors to provide direct case management, supportive services coordination, and job placement assistance to individuals participating in Career Pathway Programs with the City of Philadelphia. In addition to having low educational attainment, limited literacy and digital literacy proficiency, and English language challenges, program participants may face employment barriers related to transportation, child care, housing, criminal history, and possessing a valid driver's license.

The primary objective is to provide high-quality, trauma-informed, person-centered case management, effective supportive services, and job placement assistance to program participants to foster self-sufficiency and life stabilization, which are necessary prerequisites to securing and retaining employment. Services are to be provided, for a limited time, by a stable cadre of trained, competent, and resourceful professionals with experience serving priority populations (i.e. opportunity youth (ages 18-29), justice-involved individuals, and immigrants).

The selected Vendor will be responsible for the following services:

Case Management & Supportive Services Coordination

1. Perform initial intake assessment to identify participants' needs and barriers to employment; report on assessment findings and trends.
2. In partnership with the MDO Project Manager, create and execute a plan comprised of strategies to provide direct case management and supportive services to address participants' needs/barriers individually (75 approx.) and in aggregate for the larger population (200 approx.).
3. Provide ongoing case management services to program participants. Case management services shall include:

- a. ongoing assessment/review of program participants' housing stability, transportation options, child care provisions, driver's license status, public benefits enrollment, educational attainment, criminal record expungement, financial status, family/social dynamics, health and well-being, and overall safety;
- b. collaborating with participants in the development and execution of action plans comprised of goals focused on removal of barriers and self-sufficiency;
- c. providing and connecting participants to supportive services via referrals and coordination/hosting of information sessions and special events.

Job Placement Assistance

- 4. In partnership with the MDO Project Manager, create and execute a plan to provide job placement assistance to participants in securing full-time, permanent employment with the City of Philadelphia or employer partners.
- 5. Provide job placement assistance which includes, but is not limited to:
 - a. delivering and/or co-training job readiness workshops on soft skills, resume writing, cover letter writing, job search and application process, interviewing, professional attire, references, and pre-employment testing

General Services

- 6. Partner with Career Pathway Program administrators to ensure an integrated system of coordination and collaboration exists that provides participants with holistic support toward program completion, removal of barriers, and increased potential for attainment and retention of permanent, full-time employment.
- 7. Develop and submit monthly reports to the MDO documenting hours worked, meetings held with City staff, services provided to program participants, connections made to supportive services, status and progress of individuals action plans, job placement statistics, and status of overall plan.
- 8. Firms Only: Hire and/or retain a qualified team of no less than three staff members for this project. Firms and Individual Contractors: For this project, the position title for each staff member is Employment Success Coach. Minimum qualifications for staff include the below preferred and acceptable criteria:
 - a. Preferred: a bachelor's degree in Social Work, Psychology, Counseling, Education, Human Resources, or related disciplines with two (2) years of experience providing direct case management services and/or job placement assistance to underserved or disadvantaged populations
 - b. Acceptable (in lieu of a degree): a minimum of three (3) years of experience providing direct case management services and/or job placement assistance to underserved or disadvantaged populations

Caseload Note: The estimated number of participants receiving direct case management and job placement assistance through this RFP is 75. If a firm is selected as the vendor, the firm would be responsible for ensuring service provision to all participants. If three individual contractors are selected as vendors, each individual contractor would be responsible for a caseload of approximately 20-25 participants each.

Proposal Information to be Submitted

The proposal from Firms should address the following:

- Team structure and composition, with education and experience levels of each staff member
 - indicate the number of hours per week each staff member can dedicate to the project or the entire team can dedicate collectively to the project (e.g. 30, 35, 37.5, 40 hours per week)
 - How your organization would coordinate with other key agencies working with the participants
 - Explain your background in, and how you would achieve, the following:
 - Supporting underserved populations with barriers to attaining and retaining employment
 - Coordinating and hosting information sessions that offer free or low-cost resources or services from reputable providers
 - Strong working knowledge of public, non-profit, and/or community-based providers of a diverse array of supportive services
 - Strong advocacy abilities and direct experience advocating on behalf of clients
 - Delivering classroom-based workshops or seminars for diverse audiences
- Case management strategy
 - Indicate the primary strategy the Applicant proposes utilizing to provide case management services to approximately 75 individuals over six and a half months
 - What strategies would you use to serve individuals with the aforementioned barriers to employment
 - How would you structure the provision of case management – how often would you meet with participants and for how long
 - What are the expected measures of success for the participants?
 - What challenges do you anticipate and how would you overcome those challenges?
- Existing relationships/partnerships
 - indicate which organizations the Applicant currently has relationships or partnerships with for supportive services referrals
- Job placement experience
 - Indicate relevant workforce development and/or job placement assistance experience serving disadvantaged populations
 - specify programs or projects in which you directed or participated that led to participants (job seekers) securing employment
 - cite job placement figures
- Overall qualifying experience
 - Provide background on experiences working with or serving youth, young adults, individuals with low educational attainment, low literacy, numeracy, and digital literacy, returning citizens, justice-involved individuals, and/or immigrants. Include the number of people served, services provided,

- o outcomes, and project time period.
- Data collection process and storage system
 - o Indicate which case management software the Applicant utilizes, if any
- References
 - o Include contact information for a minimum of (2) references who can speak directly to the applicant or firm's experience with similar types of work as described in this RFP.

The proposal from Individual Contractors should include the following:

- A cover letter that addresses or includes:
 - o A statement of interest
 - o Available start date
 - o The number of hours per week that can be dedicated to the project (e.g. 30, 35, 37.5, or 40 hours per week)
 - o Salary requirement, as a per hour rate
- A resume that addresses or includes:
 - o Work history detailing experience with providing case management service and/or job placement assistance to underserved/disadvantaged populations, such as:
 - youth, young adults, individuals with low educational attainment, low literacy, numeracy, and digital literacy, returning citizens, justice-involved individuals, and/or immigrants
 - o Experience in delivering or training job readiness workshops/classes
 - o Education, certifications, and/or formal training
 - Must meet the aforementioned preferred or acceptable qualifications
 - o Names of case management or other software/systems used in professional capacity for case management or job readiness purposes
- Contact information for a minimum of (2) professional references who can speak directly to your experience with similar types of work described in this RFP

The Vendor will partner with MDO staff, Career Pathway Program administrators, affiliated providers, and key stakeholders when necessary, applicable, and appropriate, as determined by the MDO project manager.

Location and Times of Operation

The Career Pathway and Workforce Readiness Programs are geographically dispersed throughout the City of Philadelphia. It is expected that Employment Success Coaches will travel to meet with participants in-person at the participant's office work location or training classroom, when feasible and during traditional and non-traditional hours between 8:00AM and 7:00PM, Monday through Friday for at least the initial intake interview during the assessment phase. Other methods of communicating and connecting include telephone and e-mail.

Vendor Capabilities and Aspects for Consideration

The vendor should possess extensive experience in providing direct case management support, connecting individuals to value-added supportive services, and assisting job

seekers with securing employment. Additional relevant experience should include:

- Utilizing client-centered or person-first approaches in the delivery of case management services
- Supporting underserved populations with attaining and retaining employment
- Coordinating and hosting information sessions that offer free or low-cost resources or services from reputable organizations/providers
- Strong working knowledge of public, non-profit, and/or community-based providers of a diverse array of supportive services
- Strong advocacy abilities and direct experience advocating on behalf of clients
- Performing workforce development, job placement, or career services functions
- Delivering classroom-based workshops or seminars for diverse audiences
- Technology proficiency in utilizing case management software and MS Office applications

Budget

The total estimated budget for this project is \$100,000. The selected vendor(s) bear sole responsibility for all expenses associated with fringe benefits and hours incurred over and above weekly contracted hours.

Services and Tangible Work Products

The Fund requires at least the services and tangible work products listed below. Applicants may propose additional or revised services and tangible work products, but should explain why each is necessary to achieve the project objectives.

Services

The MDO requires the services listed below including the specific tasks and work activities described. Applicant's proposed scope of work should state the individuals responsible for completing the task.

- In partnership with MDO Project Lead, develop of a project plan with desired project outcomes, specific tasks with associated responsible party and deadlines
- Partner with the MDO Team to develop, implement, and utilize a realistic case management strategy that meets the needs of the participants
 - The service approach should be designed to ensure seamless integration into the existing structure and processes of the respective programs
 - Criteria for receiving service and discharge will need to be determined
- Develop data collection instruments to be incorporated in the provision of case management services, specifically during the initial intake assessment
- Perform a comprehensive initial intake assessment and identify most commonly needed supportive services for participants receiving direct case management
- Identify and report on the specific challenges or barriers participants face regarding:
 - successfully participating in and completing the career program, and
 - securing and retaining permanent employment, post-program completion
- Provide case management services via one-on-one and group sessions that result in improved levels of stability or self-sufficiency in the following primary domains:
 - Transportation

- Housing
- Child Care
- Driver's license attainment/restoration of privileges
- Public benefits enrollment
- Financial management
- Criminal record expungement
- High school diploma or equivalency attainment
- Overall safety
- Provide case management services via one-on-one and group sessions that result in improved levels of stability or self-sufficiency in the following secondary domains:
 - Health and Well-Being
 - Family / Social dynamics
- Collaborate with the participant to develop a personal action plan to address challenges and barriers; action plan goals should be specific, realistic, measurable, mutually acceptable, and time limited
- Motivate, coach, and support participants in accomplishing their action plan goals
- Maintain awareness of, and connect participants to, resources and supportive services
- Develop and maintain partnerships with other service providers (within and external to the City of Philadelphia) to facilitate the referral process for participants
 - Partner with MDO Project Manager in the procurement process of fee-based supportive services and information sessions; costs are paid by the MDO
- Plan, coordinate, and host events and information sessions to facilitate the provision of supportive services and resources to all participants (e.g. group-style information session on driver's license restoration privileges)
- Perform follow-up and advocacy activities to ensure participants receive supportive services from referral agencies in a timely and adequate manner
- Provide job placement assistance to participants as they near program completion and post-program completion, deliver job readiness/soft skills training classes, assist with resume and cover letter creation, identify and share suitable jobs for participants to apply to, conduct mock interviews, assist with completing job applications, and provide ongoing coaching throughout the job-seeking process.
- Utilize a system and/or software for managing, monitoring, and tracking case management activities and supportive services, job placement efforts and statistics, as well as resulting outcomes and impacts associated with action plans

This section is intended only as an overview of specific services to be provided by the applicant for this project(s).

Tangible Work Products

The MDO requires completion and delivery of the tangible work products listed below. The proposed scope of work should state in detail how the Applicant will produce each work product, including the individuals/job titles that will be responsible for delivering the work product. Applicants may propose additional or revised tangible work products, but should explain why each is necessary to achieve the project objectives.

- Documented case management strategy, approach, or framework
- Documented criteria or intake questions for initial intake assessment
- Report of initial intake assessment findings and recommendations
- Initial and periodic reports of trends related to commonly needed supportive services
- Aggregate reports of participant and individual action plan statuses
- Reports of supportive services provided and associated costs, if any
- Reports of job placement efforts, employment statistics and success story narratives

The City intends to ensure that all Tangible Work Products and Materials that are specifically customized or developed for the City including plans, designs, reports, and other documents rendered by the Vendor shall become the sole property of the City except for the Vendor’s previously developed or currently existing work materials.

This section is intended only as an overview of specific work products to be provided by the applicant for this project(s).

Milestones

The Department anticipates the work for this project will be organized into the following milestones (at a minimum). Applicants may propose additional or revised milestones, or a project structure that does not rely on milestones, but should explain their reasons for the structure proposed and how it will facilitate completion of the work.

The Department reserves the right to condition payments on the satisfactory completion of the specified milestones, tasks, services and/or delivery of tangible work products. The Applicant should identify the milestones or work product deliverables the Applicant proposes as qualifying for payment and the amount of payment it proposes for each milestone or deliverable. Applicants may propose alternative means of payment, but should explain their reasons for the alternative and how it will facilitate completion of the work.

Timetable

| Milestone | Date |
|------------------------------------|-----------------------------|
| Questions about RFP due | January 24, 2018 |
| Proposals Received | January 26, 2018 |
| Final Selection | February 2, 2018 |
| Finalize and Sign Contract | February 5-7, 2018 |
| Kick-off Meeting | February 8-9, 2018 |
| Service Implementation Time Period | February 12-August 31, 2018 |

The Fund anticipates that the direct service work required under this RFP will be completed by August 31, 2018.

Monitoring/ Security

By submission of a proposal in response to this RFP, the Applicant agrees that it will comply with all contract monitoring and evaluation activities undertaken by the City of Philadelphia and the Mayor's Fund for Philadelphia, and with all security policies and requirements of the City.

Reporting Requirements

The successful Applicant shall report to the MDO Project Manager, on a regular basis regarding the status of the project and its progress in providing the contracted services and/or products. At a minimum, the successful Applicant shall submit a monthly invoice detailing the services and/or products provided, the goals/tasks accomplished, and the associated costs. If hourly rates are charged, the invoice must also detail the number of hours, the hourly rate, and the individual who performed the service.

Periodic progress reports shall be prepared describing tasks accomplished and outstanding, work products delivered and outstanding, decisions agreed upon and aspects still requiring a decision, and overall progress toward project completion. It shall contain an updated project schedule and budget information and shall specifically include information regarding change orders and submittals as well as the Consultant's invoice status. Progress reports will be submitted with each payment request, or monthly, whichever represents the shorter duration. Upon review and approval of deliverables by the MDO Project Manager, the invoice will be submitted for payment by the Fund.

Insurance Requirements

The standard minimum insurance policy requirements to be maintained by Vendors of The Mayor's Fund are listed below. Vendors must maintain:

1. Workers' compensation (or similar) insurance as required by the jurisdiction where the Services are performed
2. Commercial general liability insurance (including products liability, completed operations and contractual liability coverage) with minimum limits applicable to bodily injury and property damage of \$1,000,000 per occurrence, and \$2,000,000, and containing a waiver of subrogation against The Fund
3. Excess or umbrella insurance with minimum limits of \$1,000,000 per each occurrence and in the aggregate and containing a waiver of subrogation against The Fund
4. Errors and omissions insurance with minimum limits of \$1,000,000 combined single limit

Such policies must (a) be in Vendor's name unless agreed upon in writing by The Fund, (b) include The Fund and its employees as additional insureds, (c) not have a deductible exceeding \$25,000 per claim, and (d) be placed with insurers reasonably acceptable to The Fund, having a Best's rating of no less than "A-". These minimum insurance amounts are not to be construed as limiting a Vendor's right to obtain additional coverage and higher liability limits at Vendor's discretion. Vendor may be required to provide proof of insurance at the Fund's discretion.

Submission Requirements: Qualifications:

1. Organization & Personnel Qualifications: Provide a statement of qualifications and capability to perform the services sought by this RFP, including a description of relevant experience with projects that are similar in nature, size and scope to that which is the subject of this RFP. The proposal must identify the applicant's qualifications by education level, skill set (described in detail), experience level, and job title. Experience with "like" projects should be cited.

2. Scope of Work Description:

The scope of work proposed by Applicant should include a general project schedule that identifies all tasks, activities, deliverables, and milestones the Applicant proposes to perform for the project and a time of completion (measured from project start date) for each. The Applicant should state the number of days following the Fund's authorization to proceed by which it will be ready to start the work, including any mobilization time. If the Applicant proposes a different overall time of performance, it should state its reasons.

3. Cost Proposal (for Firms Only):

Applicants must provide a detailed cost proposal, which must include 1) a line-item breakdown of the costs for specific services and work products proposed, and 2) a statement of staff hourly rates, if applicable. The proposed price must include all costs that will be charged to the Fund for the services and tangible work products the Applicant proposes to perform and deliver to complete the project. Any contract resulting from this RFP will provide for a not-to-exceed amount in the compensation section of the contract.

4. Deadline for Submission:

Responses to this RFP must be emailed as a single PDF by 5:00pm January 26, 2018 to mayorsfund@phila.gov and zakiyyah.ali@phila.gov.

Proposal review and Selection Process:

It is expected that proposals will be reviewed and a limited number of interview meetings will be held during January 29-February 1, 2018.

The successful candidate will be the firm or individual who demonstrates the following:

- The ability to provide project-based, direct case management services to 75 individuals over a six and a half-month time period.
 - Estimated caseload per Employment Success Coach is 20-25 participants
- The human talent capacity and resources to deliver case management services on a project basis (approximately six and a half months, mid-February-August 2018).
- A highly credentialed and trained team or staff with strong experience serving target populations (individuals with low educational attainment, limited literacy and digital literacy proficiency, English language challenges, criminal

background, and other barriers to employment).

- Strong experience utilizing motivational interviewing, client centered or person-first approaches in the provision of case management or supportive services to underserved communities and individuals with barriers to employment.
- Strong experience in the workforce development field, specifically with regard to assisting underserved populations with attaining and retaining employment via the delivery of job readiness training and coaching.
- The requisite, knowledge, experience, and ability to perform the work outlined.
- The ability to perform the work outlined effectively, efficiently, on budget, and on time.