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Kanawha*

**REQUEST FOR PROPOSAL FOR  
WORKFORCE INNOVATION & OPPORTUNITY ACT:  
Certified Public Accountant**

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Release Date: [ 11/17/2025]

Proposals Due: [ 12/09/2025]

Funding Period: July 1, 2025 – June 30, 2026

A Letter of Intent is due by 11/21/2025 by  
9am and must be sent to Michele Painter at  
[mpainter@wdbkc.org](mailto:mpainter@wdbkc.org)

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# Section I: Program Description & Background

## 1. Purpose of RFP

The Region III Workforce Investment Board (R3WIB) is seeking proposals from qualified licensed Certified Public Account applicants that have experience not only in consulting services but proficient knowledge and experience of accounting computer software such as QuickBooks and MS office products. Ten years total professional experience professional experience is required, including WIOA (Workforce Innovation Opportunity Act) and Federal Grant accounting functions.

Applicants will provide oversight, analysis and recommendations for monthly internal financial statements prepared by the company. Applicants will provide analysis and recommendations on policies and procedures, assist with cash flow and budgeting models for various purposes and assist with new projects as they develop upon request. More information about the R3WIB, WorkForce West Virginia, and U.S. Department of Labor can be located on their respective websites:

- R3WIB: <https://www.wdbkc.org>
- WorkForce West Virginia: <https://workforcewv.org/>
- U.S. Department of Labor (WIOA): <https://www.doleta.gov>

## 2. The Workforce Innovation and Opportunity Act

Region 3 Workforce Investment Board's (R3WIB) One-Stop System services and programs are funded through the Workforce Innovation and Opportunity Act of 2014 (WIOA). Therefore, each Proposer must be familiar with state and federal requirements of this program and the R3WIB's local plan.

WIOA provides workforce development activities through statewide and local workforce development systems. These systems should increase employment, retention, earnings, and occupational skill attainment by participants and, as a result, improve the quality of the workforce. WIOA requires the creation of a One-Stop System through which job seekers and businesses will access One-Stop Services.

The R3WIB reserves the right to designate and fund the type and mix of specialized services that ensure the creation and maintenance of a One-Stop System that enhances the range and quality of workforce services to be made available in its constituent counties.

## 3. Region 3 Workforce Investment Board

R3WIB is a 501(c)(3) non-profit organization designated as the administrative entity, organizer, and grant recipient of Workforce Innovation and Opportunity Act (WIOA) 2014 funds. R3WIB encompasses a one (1) county area in West Virginia consisting of Kanawha County, WV.

**Mission:** R3WIB will forecast, fulfill, and monitor the education and skill needs of employers and individuals in order to meet the needs of both sets of customers. We will:

- Reduce or eliminate the barriers to economic development and barriers that separate skilled and unskilled workers.
- Increase the efficiency and effectiveness of customer links to resources.

- Monitor and provide incentives to system participants to encourage continuous improvements and to meet/exceed state performance goals.
- Coordinate and integrate training, education, and economic development systems to meet community and employment needs.

**Vision:** A skilled workforce that enables our economy to expand and individuals to be self-sufficient through an integrated system.

#### 4. Role of the Certified Public Accountant, PLLC

The Certified Public Accountant, will assist Fiscal staff and support Executive Director in carrying out his/her responsibilities in the financial policy including; system building, member communications, administration and compliance.

##### Additional responsibilities of the Certified Public Accountant, PLLC:

- A. Assisting Fiscal Director in preparing annual budget and monthly financial statements.
- B. Prepare monthly management reports for WIB board members. Reports will include monthly, quarterly and annual projections for grant and operating costs.
- C. Maintains confidential files and prepares reports for filing with the State as required. Reports and forms include Form 990, A-123 Audit Report, Quarterly and Annual DOL reports.
- D. Perform and prepare tax reports including W-2 and 1099 as needed.
- E. Provide professional services in assisting internal staff with grant management and software

#### 5. Eligible Respondents

Proposer(s) may be any organization(s) structured in accordance with the state and federal laws with experience in certified public accounting.

No entity may compete for funds if (1) the entity has been debarred or suspended or otherwise determined to be ineligible to receive federal funds by an action of any governmental agency; (2) the entity's previous contracts have been terminated for cause; (3) the entity has not complied with an official order to repay disallowed costs incurred during its conduct of programs or services.

R3WIB will afford full opportunity for minority and women-owned business enterprises to submit a show of interest in response to the invitation and will not discriminate against any firm or individual on the grounds or race, creed, color, sex, age, handicap status or national origin in the contract award.

**Additional Requirements:** The State and local boards shall ensure that in carrying out activities under this title:

1. Disclose any potential conflicts of interest arising from the relationships of the operators with training service providers or other service providers. An entity serving as Youth Employment Service Provider may also serve a different role with R3WIB and perform some or all these functions when acting in its other role if it has established sufficient firewalls and conflict of interest policies and procedures.
  - a. Pursuant to 20 CFR 679.430, any entity selected or otherwise designated to perform more than one of the functions within the local One-Stop system must develop a written agreement with the local workforce development board and the CLEO to clarify how the entity will carry out its responsibilities while demonstrating compliance with WIOA and

corresponding regulations, relevant Office of Management and Budget circulars, the State's conflict of interest policy, and the R3WIB conflict of interest policy.

2. Do not establish practices that create disincentives to providing services to individuals with barriers to employment who may require longer-term services, such as intensive employment, training, and education services; and
3. Comply with Federal regulation, and procurement policies, relating to the calculation and use of profits.
4. Respondents must comply with Section 504 of the Rehabilitation Act of 1973, the Federal Drug-Free Workplace Act of 1988, and the Americans with Disabilities Act to be eligible.

## 6. Project Timeline & Funding

The table below provides a timeline of activities for this procurement.

Activity	Date
RFP Release	11/17/2025
Mandatory Bidder Conference & Questions -	12/2/2025
Proposal Deadline	12/09/2025
Rating Committee Scoring	12/12/2025
Recommendation to R3WIB Full Board	12/16/2025
Contractual Start Date	12/17/2025

Please include in the mandatory budget form service fee rates for the services outlined in the duties and responsibilities on page 4. In addition to the required standard billing rates please include any out-of-pocket expenses. The annual contract may be renewable up to two (2) times.

## 7. American Job Centers in Region 3 service area:

The R3WIB has one comprehensive center

- **Kanawha County:** 426 Leon Sullivan Way Charleston, WV 25301

## Section 2: Scope of Work

Proposals should be developed and organized as outlined below. Interested bidders should respond to each section's requirement in its entirety. For example:

### *Experience and Capacity*

- 1) *Briefly describe your organization's history, including the number of years in operation, past services provided, and customer and geographies served.*
  - a. *[Insert organization's response]*
- 2) *Explain how your organization's vision, mission, and objectives align with this funding opportunity.*
  - a. *[Insert organization's response]*

### Experience & Capacity (10 points)

1. Briefly describe your organization's history, including the number of years in operation, past services provided, and customers and geographies served.
2. Explain how your organization's vision, mission, and objectives align with this funding opportunity.
3. Describe your organization's governance and management structure, vision and mission, objectives, and major programs and/or services.
4. Describe your organization's financial and administrative experience and capabilities managing and accounting for multiple federal, state, and local funding sources and conducting self-monitoring for performance and compliance. Bidders must be in accordance with Generally Accepted Accounting Principles (GAAP).
5. If submitting a response as a consortium, explain your rationale for the R3WIB model and how collaboration will be managed. Identify the lead consortium partner and describe the roles and responsibilities of each partner. Attach a detailed MOU between all consortium partners.
6. If subcontractors are included in the proposal, explain your rationale for their inclusion and describe the roles and responsibilities of each subcontractor. Attach a detailed MOU with each subcontractor included in the proposal.

### Qualifications (15 points)

7. Describe your organization's project management experience within the past three (3) years. Describe the nature and scope of the work performed and quantify the scale of work in terms of contract amount and number of personnel and/or participating entities.
8. Describe your organization's relationship management experience within the past (3) years, including experience with:
  - a. Developing and facilitating complex partner relationships
  - b. Facilitating collaboration across multiple partners
  - c. Negotiating
  - d. Resolving conflicts and mediating between partners.
9. Describe your experience developing and implementing continuous improvement processes within the past three (3) years.
  - a. Describe the nature and scope of the processes implemented and quantify the work in terms of contract amount, complexity, and scale of processes, and/or other relevant parameters. Describe methodologies and technologies used.
10. Describe your organization's relevant industry experience within the past three (3) years, including experience with:
  - a. Operating workforce development programs
  - b. Operating social service programs
  - c. Working with WIOA One-Stop Partners
  - d. Contracting with governmental or quasi-governmental agencies.
11. Describe your organization's experience working in the similar communities (geography, size, demographics, labor market, etc.,) within the past three (3) years. Explain your understanding of the social and economic challenges facing the region and describe how your organization has provided or tailored services to address these challenges.
12. Attach three (3) letters of reference that attest to your organization's experience

### Staffing Plan (15 points)

13. Specify the annual percent FTE budgeted for each staff (specify title) who will perform the work of the Certified Public Account, PLLC
14. Provide a detailed explanation of the role each staff will play in executing the proposed program design.
15. Describe the management and reporting structure that will govern the work of the proposed staff.
16. Describe how your organization will evaluate individual staff performance on executing the proposed program design of youth employment services.
  - a. Describe your practices for staff performance review and improvement, including any specific evaluation criteria or tools that may be used.
17. Provide the name and title of the lead individual staff person who will perform the services of the Public Certified Accountant. Describe the relevant education and training, professional experience, skills, and other characteristics that qualify them to perform the proposed role.
  - a. Attach a current resume (with up-to-date information on current title and functions) for each proposed staff.
  - b. Attach a job description for each proposed staff position that has not yet been hired.
18. Describe your organization's professional development policies and practices.
  - a. How will your organization develop proposed staff to ensure that they maintain current knowledge and skills required for the scope of work?
  - b. What development activities and resources does your organization provide internally to staff?
  - c. What external development activities and resources do you make available to staff?
  - d. Describe how managers and supervisors support staff development.

### Project Design (35 points)

19. Describe the strategies, methods, and specific activities your organization will undertake to successfully perform each of the following functions and responsibilities of the role of Public Service Accountant.

### Budget (25 points)

20. Provide a budget narrative that justifies each proposed expense included on the Budget Form. Fully explain the proposed programmatic costs. For example, if funding is budgeted for support services, describe types of assistance that might be provided with the funds.
21. Identify any in-kind resources/support for the service delivery system beyond what is requested in the budget. Include each committed or proposed source of funding and the amount of that funding.
22. Describe your organization's contingency plans to repay the R3WIB in the event there are any disallowed costs because of an audit or monitoring review.
23. Describe how the proposing agency will financially support the costs of doing business until an invoice can be submitted and paid by the R3WIB.
24. State what method of payment will be requested, either fixed unit price or cost reimbursement with a demonstrated performance basis. If a fixed unit price contract is proposed, describe in detail the proposed outcome payment points and the documentation that will be submitted to provide attainment of the outcome. If a cost reimbursement with a demonstrated

performance holdback contract is proposed, provide the proposed percentage of the total cost that will be withheld (maximum is 50%). Describe the measurable performance outcomes to which the organization will tie payment and the documentation that will be submitted to provide attainment of the outcome.

## Section 3: Submission & Evaluation

### 1. Bidders Conference & Questions

All questions that interested parties may have can be directed to Michele Painter at: [mpainter@wdbkc.org](mailto:mpainter@wdbkc.org) **Questions will be addressed at the Mandatory bidder's conference on 12/02/2025 at 9:00am located at 426 Leon Sullivan Way Charleston, WV 25301**

### 2. Proposal Instructions

The Scope of Work should be completed entirely, should not exceed 15 pages, and be typed in 12-point font, single-spaced, 1" margins on all sides, page numbers, and table of contents. **Once completed, interested parties must submit their proposal electronically to Michele Painter at [mpainter@wdbkc.org](mailto:mpainter@wdbkc.org) on or before 12/09/2025 3:30PM EST.** Please have your proposal organized in the following manner:

- Attachment A: Cover Page
- Attachment B: Conflict of Interest Form
- Attachment C: Budget Form & Narrative
- Attachment D: Reference Form and Letters
- Two (2) Years of Audited Financial History
- Documentation of registration for private, for-profit, or non-profit organizations (if applicable)
- Proposal (scope of work)
- Staff Resumes
- Job Descriptions for Proposed Staff Positions Not Yet Hired (if applicable)
- Additional Attachments as necessary
  - If submitting as consortium, attach a detailed MOU among all consortium partners
  - If subcontractors are included in your proposal, attach a detailed MOU with each subcontractor included in your proposal

Bidder does not have to provide the response in the prescribed format as long as each action required is addressed. Bids that fail to follow will risk losing points in their overall score

### 3. Evaluation and Award

Proposals will be evaluated by R3WIB to ensure each submission meets all criteria outlined in this RFP. The R3WIB Board members will develop and use a scoring matrix to evaluate each proposal. Each section of the scoring matrix is worth the following number of points:

Section	Points
Experience & Capacity	25
Technical	30
Compliance	15
Cost Proposal	30
<b>TOTAL</b>	<b>100</b>

All items that are mandatory (e.g., inclusion of attachments, financials, etc.) are considered pass/fail

#### Notice of Award

All respondents will be notified by email as to their award status.

### 4. Appeals Process

Any disagreements resulting from this procurement process must be submitted in writing and sent to Board Chair, Tim Morris at [morriswv@gmail.com](mailto:morriswv@gmail.com)

### 5. Fiscal Review

R3WIB will conduct a fiscal review of all qualified proposals. We will review proposal budgets, agency audits, and responses to questions related to fiscal operations. The R3WIB reserves the right to review and request further information regarding the respondent's financial situation, if not sufficiently outlined in the submitted audit(s). The R3WIB reserves the right to assess the risk posed by any recent, current, or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition, or other event that might affect an organization's ability to operate the requested program.

### 6. Past Program Performance

R3WIB may review a respondent's performance on any previous and/or existing grant agreement(s) as well as check references submitted from other grantors. Achievement of grant agreement outcomes, along with compliance with programmatic and fiscal guidelines and timelines may be evaluated. The review team may perform an in-depth evaluation of all responsive proposals based upon the criteria herein. Prior to its final funding decision, the R3WIB may also: 1) meet with representatives of the responding entity to discuss the proposed program and budget; 2) identify and/or negotiate program or budget changes the responding entity must make as a condition of funding; and 3) identify other documentation the entity must provide as a condition of funding; 4) negotiate numbers of adult and dislocated workers to be served.

## **7. Accessibility and Equal Opportunity**

R3WIB is committed to equal access for all customers to all services. All contractors must ensure equal opportunity to all individuals. No individual in R3WIB shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any Workforce Innovation and Opportunity Act funded program or activity because of race, color, religion, sex, national origin, age, disability, English proficiency, sexual orientation, political affiliation, or belief. All entities are expected to demonstrate full compliance with the Americans with Disabilities Act Amendments Act of 2008 (ADAAA) and all other equal opportunity laws. This includes ensuring contract staff receive accessibility training and may involve developing accessibility plans. All respondents must ensure all written materials and communications include the statement: "Reasonable accommodations and auxiliary equipment and services are available upon request."

## **8. Contract Award**

The contract will be awarded based on the most responsive bidder whose offer is most advantageous to the R3WIB in terms of cost, functionality, past performance, and other factors specified in this RFP. The award may be negotiated at the discretion of the R3WIB or made based on the initial bid/offer received, without discussions or requests for best and final offers.

## Reference Information

### Attachment A: Cover Sheet

Please complete this **mandatory** cover sheet accordingly.

Organization Name				
Address				
Phone Number				
Number of Years in Business				
FEIN #				
DUNS #				
Acknowledgement that Proposing Entity is up to date on taxes and not currently debarred or suspended.		YES		NO
Acknowledgment that the R3WIB reserves the right to review and request further information regarding the respondent's financial situation.		YES		NO
Type of Organization (check all that apply)	<input type="checkbox"/>	Higher Education	<input type="checkbox"/>	Private
	<input type="checkbox"/>	Community-Based Org.	<input type="checkbox"/>	Business Organization
	<input type="checkbox"/>	Government Agency	<input type="checkbox"/>	Other (explain)
	<input type="checkbox"/>	Labor Organization		
	<input type="checkbox"/>	Non-Profit		
	<input type="checkbox"/>	Employment Service State Agency (Wagner-Peyser)		
Contact Person				
Contact Person's Email Address				
Signatory Authority Signature				

## Attachment B: Conflict of Interest Form

By submitting a proposal, the authorized signatory authority of the bidding entity certifies to his/her knowledge and belief that there is no conflict of interest (real or apparent) inherent in the bid or in delivering the scope of work if the R3WIB awards a contract. A conflict of interest would arise if any individual involved in the preparation of this proposal and delivery of services has a financial or other interest or would be likely to gain financially or personally from the award of a contract. The same would hold true for any member of the individual's family, partner, or an organization employing or about to employ any of the above as a direct result of the successful award of a contract under the RFP. The R3WIB reserves the right to disqualify a bidding entity should a conflict of interest be discovered during the solicitation process.

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Signatory Authority Name

Title Signature

Date

*Note: This form is a **mandatory** required document to be considered for either component. Bidders should only complete this form once per entry.*

## Attachment C: Budget

Please complete the **mandatory** budget form and narrative explanation below for Certified Public Accountant, PLLC

Line Item	Budget Amount (Contract Period)
Personnel (Wages/Staff)	\$
Fringe Benefits	\$
Travel	\$
Equipment	\$
Supplies	\$
Communications (including Copying/Printing)	\$
Other	\$
<b>Subtotal Program</b>	\$
Administrative Indirect	\$
<b>TOTAL BUDGET REQUEST</b>	\$

**Budget Narrative:** Please provide a detailed explanation for each allowable budget line item to justify the cost. Examples of explanations include job titles, wage rate, hours worked/charged, types of benefits and rates, estimated mileage/visits to locations, office and other supplies, and agency program operation or program costs. No travel expenses may be claimed for commute to/from “official station.” Travel expenses may be claimed from the official station. West Virginia State Mileage Rate is \$0.70(as of 2025).

Attach the Budget Narrative indicating all operating expenses in the listed categories. Each budget category requires an additional line-item detail that addresses the method of calculation and justification for the expense. Therefore, the Respondent shall develop and include a line-item budget to meet the intent and requirements of the program, to ensure the successful implementation of the program, and to show that the program is cost-effective. The Respondent should prepare a realistic and prudent budget avoiding unnecessary or unusual expenditures that would detract from the accomplishment of the objectives and activities of the program.

**All funding of this RFP is contingent upon the R3WIB and/or partner agreements having fund availability and may change based on increase/decrease in allocations, de-obligation of funds, new initiatives, and decisions of the R3WIB.**

**Attachment D: References** – Bidders are **required** to provide three letters of references who can verify their experience, along with a contact phone number or email. References should be for experience in the past 5 years.

**Reference #1** \_\_\_\_\_

Email: \_\_\_\_\_

**Reference #2** \_\_\_\_\_

Email: \_\_\_\_\_

**Reference #3** \_\_\_\_\_

Email: \_\_\_\_\_

List the agency contact information for all current contracts or contracts for the past 3 years. Do not duplicate those listed as references.