



## BankWork\$® Pittsburgh Request for Quotes: Program Provider

Partner4Work, in collaboration with the PA Bankers Association and thirteen partnering financial institutions, is excited to bring BankWork\$® to the Pittsburgh market in 2019. Created in 2006 by the Sheri and Les Biller Family Foundation, BankWork\$® is an industry-recognized training program that has placed more than 1,800 graduates in customer-service jobs at financial institutions in 14 cities across the United States. The first training of its kind in the Pittsburgh region, BankWork\$® will help meet the talent needs of participating financial institutions and jobseekers.

### Who We Are

Partner4Work (formerly Three Rivers Workforce Investment Board) is the workforce development organization that connects funding, expertise, and opportunities to develop a thriving workforce in the Pittsburgh area. We partner with businesses to source and train the talent needed to grow the region's economy. We partner with job seekers to break down barriers and open doors to opportunity for careers in growing industries. And we partner with agencies to make an impact in communities, to reach people where they are, and set them on the path for a promising future.

### Background and Statement of Need

BankWork\$® trains young adults from low income and minority communities for lasting careers in the financial services industry. BankWork\$® classes are free for participants. The classes run for eight weeks and provide training in the skills needed for jobs as tellers, customer service representatives and personal bankers. BankWork\$® also offers job interview practice, job placement assistance and ongoing coaching and mentoring to help with career advancement.

Partnering financial institutions will be actively engaged throughout the 8-week training program through hands-on activities such as job shadowing, classroom presentations, and mock interviews. The training will culminate in a graduation event and job fair during which graduates will be able to apply for jobs and network with representatives of each partnering employer. All graduates will be encouraged to join the BankWork\$® Pittsburgh Alumni Network to receive peer support as they launch their careers, as well as to mentor and recruit talent from future cohorts. BankWork\$® Pittsburgh staff, participants, and employers will have access to BankWork\$® network of affiliate cities across the county, with frequent opportunities to meet and share best practices.

Partner4Work will implement the BankWork\$® training in 2019, with a goal of training 50 individuals (two consecutive cohorts of 25 participants each) between June 2019 and March 2020. Over time, Partner4Work plans to scale BankWork\$® to support multiple cohorts in different locations.

**Partner4Work seeks an experienced community partner to play a critical role in supporting the launch and day-to-day delivery of BankWork\$® first cohort in Pittsburgh, as described below.** The successful applicant will have the capacity and expertise to plan and execute an effective strategy for recruitment and program delivery. The successful applicant will also have a proven ability to collaborate with non-profit, government, and industry partners to achieve outcomes.

## Required Project Activities

- Serve at least 50 BankWork\$<sup>®</sup> program participants from intake/assessment through completion of programming, with a goal of 42 successfully completing the training program by April 2020 and 30 obtaining employment placement in related jobs by June 2020. The first training cohort must be completed by November 2020.
- Understand and adopt all BankWork\$<sup>®</sup> program standards, licensing requirements and best practices. BankWork\$<sup>®</sup> is a proprietary career-training program and a registered trademark. Partner4Work is a licensed BankWork\$<sup>®</sup> program provider for the Pittsburgh region and will work with the selected program partner to support onboarding, including train-the-trainer sessions, as well as playing an active role throughout program implementation. The selected program partner must at all times adhere to BankWork\$<sup>®</sup> program standards and terms.
- Hire and directly oversee a BankWork\$<sup>®</sup> Program Instructor, a qualified individual with classroom teaching skills as well as a professional background in banking, who will be responsible for key aspects of program delivery. See attached job description in Appendix B. The BankWork\$<sup>®</sup> Program Instructor will play a critical role in the success of the program; therefore Partner4Work will be actively involved in the recruitment and selection of the BankWork\$<sup>®</sup> instructor. Partner4Work reserves the right to approve or deny candidates for the BankWork\$<sup>®</sup> Program Instructor position.
- Hire or appoint a qualified individual to serve as the BankWork\$<sup>®</sup> Career Navigator. See attached job description in Appendix C. The Career Navigator will provide case management (including facilitating connections to supportive services) job placement, and career mentoring to participants with barriers to participating in training. Such barriers may include: lack of education, criminal history, English as a Second Language, disability, income at or below the poverty line, and chronic employment.
- Recruit participants, leveraging provider's own networks as well as referrals from Partner4Work's network of public and private workforce partners. Partner4Work will oversee the marketing and promotion strategy, including development of collateral, and will manage an online application portal for interested candidates. Partner4Work will work closely with the program provider to ensure recruitment efforts are well coordinated. Program provider will be expected to promote approved marketing collateral using both print and electronic media.
- Screen all candidates to ensure BankWork\$<sup>®</sup> is the right program for their needs, according to parameters established by Partner4Work and BankWork\$<sup>®</sup>. Participants must be age 18 or older and possess a high school diploma or GED, as well as 9<sup>th</sup> grade level reading and math proficiency. The program provider will administer TABE tests to assess reading and math proficiency.
- Deliver BankWork\$<sup>®</sup> training at a central location that is ADA compliant and easily accessible by public transit. Each training cohort is eight weeks long and is offered three days per week, enabling participants with part-time jobs to maintain employment throughout the program.
- Organize and execute a combined graduation event and job fair at the culmination of each 8-week training cohort. Under leadership from and in close coordination with Partner4Work, engage businesses in the initiative, including participation in classes as guest speakers/subject matter experts, mock interview sessions, and most importantly, interviewing and hiring graduates.

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- Provide placement and follow-up services to all participants for one year after completion of training. Successful proposals will demonstrate how they will provide an array of services and supports to assist participants in finding self-sufficiency.
- Collect and manage program and participant data, including personally identifiable information, demographics, barriers, training attendance, services provided, training completion, and job placement. The program provider will report program data to Partner4Work on an agreed upon schedule throughout the project period, as well as upon request.
- Communicate regularly, through meetings and correspondence, with Partner4Work regarding program accomplishments, challenges, and lessons learned.

## Required Applicant Qualifications

- Proven track record of retaining individuals in training programs and successfully placing individuals with barriers to employment into careers.
- Experience delivering customer service and/or soft skills training strongly preferred.
- Established history of effectively serving individuals with barriers to employment.
- Strong relationships with the Pittsburgh business community, with demonstrated success tailoring programming to meet industry demand; knowledge of the banking industry a plus.
- Organizational, administrative, and technological capacity to screen, train and support at least 50 program participants, delivering classroom instruction and providing case management, supportive services, and job placement, and follow up services.
- Ability to communicate quickly and accurately with a network of partners and participants.
- Knowledge of workforce development best practices.

## How to Apply

Bids must be submitted by **11:00 PM on April 28, 2019**, to [bankworks@partner4work.org](mailto:bankworks@partner4work.org). Late or incomplete submissions will not be considered. Proposals should contain the following information:

1. **Cover Sheet** – Use template provided
2. **Executive Summary** (1 page maximum) that includes an overview of the organization's qualifications, including the number of years it has successfully provided services in southwest Pennsylvania, the type of services provided, and the demographics of customers served;
3. **Organization Overview** (1 page maximum) that describes each of the following for your organization:
  - a. Basic organizational description, including but not limited to year established, legal status, governance structure, mission, principal programs and services, executive leadership, annual budget and number of full-time staff.
  - b. Past experience in managing quality workforce development programs similar in size and scope to that required by this RFQ, including but not limited to individuals served, services and activities delivered, contract values and related performance outcomes.
  - c. Administrative and fiscal capacity, including but not limited to your organization's proven ability to provide fiscal support and oversight, utilize information systems, manage resources and personnel, and produce timely and accurate program reports.
4. **Program Narrative**

Proposals should outline the strategy proposed to accomplish requirements listed above, including:

- a. Staffing plan: Describe your proposed staffing plan to support the programmatic, administrative and executive components of the program. In your response, be sure to address how you will accomplish the following:
    - i. Coordinate with P4W to source highly qualified candidates for the BankWork\$ Program Instructor and Career Navigator positions. Note: if your organization plans to designate an existing staff person as the Career Navigator, you must attach a resume for that individual.
    - ii. Ensure a high level of staff performance, competency and quality customer service.
    - iii. Maintain regular and clear communication between proposed staff and P4W.
  - b. Outreach, recruitment and screening: Describe your proposed strategies for building an effective pipeline of training candidates. Your response should clearly address each of the following components:
    - i. Outreach and communications strategy to support recruitment of diverse individuals who are underrepresented in the banking sector, including those with barriers to employment.
    - ii. Screening, including how you will assess interested participants to ensure the BankWork\$ training is a strong fit.
    - iii. Coordination with Partner4Work and workforce partners, such as PA CareerLink.
  - c. Program delivery: Describe your plan for delivering an effective training program that meets the program standards and parameters described above. Your response should include the following:
    - i. Proposed training location, including accessibility of location to individuals with disabilities and proximity to public transit routes.
    - ii. Plan for delivering high quality, engaging, hands-on training that aligns with BankWork\$ curriculum and program standards.
    - iii. Plan for eliminating barriers to participation for trainees, including strategies for assessing and meeting supportive service needs.
    - iv. Plan for delivering comprehensive career services tailored to the financial service industry, including a range of activities designed to help participants successfully prepare for job placement in the banking sector. Your response should address how your organization is prepared to help participants develop soft skills as well as specific occupational skills.
    - v. Plan for delivering effective job placement and follow-up services.
- 5. Budget:** Total program budget may not exceed \$149,999.00
- a. Budget for all program-related and administrative costs. All costs must be reasonable, allowable, allocable, and necessary according to applicable federal, state and local regulations, including but not limited to the Uniform Guidance. Effective budgets will enable the proposed program to meet the intent and requirements of the contract, while being realistic, reasonable and prudent, avoiding unnecessary or unusual expenditures.
  - b. Narrative that justifies the budget and describes the purpose and calculation of each line item. The extent to which a respondent can meet performance objectives while minimizing indirect and profit costs will be a factor in the evaluation process.
  - c. Clearly identify and explain the average cost per participant served through your programming and cost per participant placed through programming. Justify the cost

effectiveness of your program.

- d. Describe any leveraged or in-kind services or donations, including cash contributions, fee for-service or other revenue generation, and in-kind contributions. List the source and dollar value of each leverage resource, as well as the role it plays in the program.

## Review and Selection Process

Partner4Work will review proposals according to the required content described in the How to Apply section with attention to clarity, completeness, and quality. High scoring proposals will clearly demonstrate an ability and likelihood to meet the standards and intended outcomes of these programs. Scoring for the required sections of the proposal will be assigned as follows:

Proposal Review Scoring Rubric	
Cover Sheet	Required, but not scored
Executive Summary	Required, but not scored
Organizational Overview	30
Program Narrative	50
Budget	20
<b>Total Points</b>	<b>100</b>

## Timeline

Partner4Work aims to have the first cohort of the BankWork\$ training programs ready to begin in Summer 2019. The estimated timeline may be subject to change.

- |                                 |                        |
|---------------------------------|------------------------|
| • Release of Request for Quotes | April 18, 2019         |
| • Proposals Due                 | April 28, 2019 (11 PM) |
| • Selection                     | May 3, 2019            |
| • Contract Start Date           | May 13, 2019           |
| • Key Personnel Hired           | June 7, 2019           |
| • Start of First Cohort*        | Summer 2019 (TBD)      |

\*BankWork\$ utilizes a staggered approach to onboarding which enables key personnel (e.g. Program Instructor and Career Navigator) to participate in train-the-trainer sessions before, during, and after key phases of the BankWork\$ training.

## Questions?

We welcome your questions and look forward to hearing from you. All questions or requests for additional information must be made in writing to [bankworks@partner4work.org](mailto:bankworks@partner4work.org). Answers will be posted at [www.partner4work.org](http://www.partner4work.org) to make them available to the public and ensure a fair and transparent process.

## Disclaimers

- This Request for Proposals does not commit Partner4Work to award a contract.
- Partner4Work may make funding decisions based on initial proposal received, without discussion of the proposal with the applicant. Accordingly, each proposal should be submitted on the strongest terms that the bidder can submit to Partner4Work.
- Partner4Work retains the right to request additional information from any applicant, before a contract award.
- No costs will be paid to cover the expense of preparing a proposal or procuring a contract for services or supplies.
- All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to the Partner4Work and be subject to disclosure under the Freedom of Information Act, Right to Know Law, or other applicable legislation.
- The contract award will not be final until Partner4Work and the successful applicant have executed a mutually satisfactory contractual agreement. Partner4Work reserves the right to make an award without further discussion of the proposal submitted. No activity may begin prior to final Partner4Work approval of the award and execution of a contractual agreement between the successful applicant and Partner4Work.
- The submission of the proposal warrants that the costs quoted for services in response to the RFQ are not in excess of those that would be charged any other individual for the same services performed by the applicant.
- Applicants are advised that most documents in the possession of Partner4Work are considered public records and subject to disclosure. Partner4Work reserves the right to issue additional RFQs if and when it is in Partner4Work's best interest to do so and, may elect to negotiate and issue multi-year contracts to successful bidders under this or subsequent RFQs. Partner4Work reserves the right to fund portions of a proposal, or to reject any and all proposals in whole or in part. Rejection of a portion of a proposal does not necessarily negate the entire proposal.
- All programs and activities are designated as equal opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities. Contact staff to request assistance with access to this RFQ.

# PARTNER WORK

The Workforce Development Board for the Pittsburgh Area

Partner Roles and Responsibilities	
<b>BankWork\$</b>	<ul style="list-style-type: none"> <li>• Support the Pittsburgh program launch, including facilitating Train the Trainer sessions</li> <li>• Provide the curriculum content and all supporting tools and documents</li> <li>• Track monthly metrics and annual detailed metrics at the national level</li> <li>• Provide regular operational support and share best practices from other markets</li> <li>• Support fundraising efforts</li> </ul>
<b>Partner4Work</b>	<ul style="list-style-type: none"> <li>• Facilitate regional Financial Services Industry Partnership</li> <li>• Serve as liaison to financial institutions participating in BankWork\$</li> <li>• Direct fund development strategies and initiatives</li> <li>• Oversee local marketing and recruitment efforts</li> <li>• Procure and monitor sub-contracted program provider(s)</li> <li>• Advise on sourcing of key BankWork\$ staff (e.g. Instructor, Career Navigator)</li> <li>• Evaluate program and report outcomes to BankWork\$ national team</li> <li>• Identify sites and partners for program expansion</li> </ul>
<b>PA Bankers Association</b>	<ul style="list-style-type: none"> <li>• Liaison with National Bankwork\$ and Partner4Work to expand in Pittsburgh</li> <li>• Recruit/encourage PA Bankers members to participate in the Pittsburgh Bankwork\$ expansion</li> <li>• Promote the Bankwork\$ program across Pennsylvania</li> <li>• Serve as a resource to Partner4Work's Financial Services Industry Partnership</li> </ul>
<b>Contracted Program Provider</b>	<ul style="list-style-type: none"> <li>• Provide physical space, staffing, and operational capacity for BankWork\$ program</li> <li>• Recruit, screen and enroll students</li> <li>• Source key BankWork\$ staff (e.g. Instructor, Career Navigator), working in close collaboration with Partner4Work</li> <li>• Deliver instruction, coaching, support services, job placement support and other BankWork\$ program components</li> <li>• Host graduation and job fair event</li> <li>• Track and report program data to Partner4Work</li> </ul>

**Note: This position description is subject to change.**

The BankWork\$ Instructor's primary responsibility is to provide program participants with the knowledge, skill set, and mind set required to begin a career in banking/financial services. This position will also support the launch and ongoing operations of the BankWork\$ Pittsburgh program, including candidate screening, collaborating with the BankWork\$ Career Navigator to deliver individualized support to participants, planning and executing a graduation ceremony/job fair following each training cohort, collecting data and reporting on outcomes. The BankWork\$ Instructor will maintain a strong working knowledge of bank partners' talent needs.

### **Key Responsibilities:**

- Utilizing the BankWork\$™ curriculum content and related program materials, teach program participants the operational fundamentals of branch banking, the features and benefits of bank products and services, strong customer service and client engagement skills, and bank product/service sales and internal referral skills.
- Working in close collaboration with the BankWork\$ Career Navigator, provide group and one on one coaching and mentoring to ensure each program participant has the competence and confidence to present themselves as a qualified and committed candidate for entry level teller, customer service representative, and/or personal banker positions.
- Identify avenues for recruitment (e.g. community-based agencies, workforce organizations), fielding inquiries and presenting information to interested partners as needed.
- Interview program candidates and administer assessments to determine eligibility for the program. Identify specific areas for individual coaching and mentoring during the course of the program
- Develop and sustain strong relationships with retail recruiters and line managers at partner banks to ensure pro-active participation in our job fairs, and prioritize BankWork\$ as a source of candidates for job openings within the banks
- Provide program participants with individual and group training on all job search related skills; resume, cover letter, online and hard copy employment applications, keys to an effective interview, appropriate attire, timeliness, and follow up.
- Plan and execute a formal graduation and job fair for each session
- Present graduates to bank partners to optimize placement results
- Accurately collect, record, analyze, and report/submit all required program and program participant performance data
- Provide feedback regarding updates and enhancements to the program curriculum and all program materials
- Manage the collection and maintenance of personal/background documentation, enrollment paperwork, and progress reports of program participants

### **Education and Experience**

- A Bachelor's degree or equivalent professional experience required.
- Minimum of 5 years of experience working in a Retail Banking
- Minimum 3 years of professional adult training experience (trainer, teacher, instructor, or educator)

### **Knowledge, Skills and Abilities**



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- Demonstrated ability to effectively interact with multi-cultural and diverse individuals with barriers to employment; strengths-based mindset and cultural competence is a must.
- Excellent oral and written communication skills with the ability to implement a highly interactive and engaging classroom experience; awareness of best practices for teaching adult learners
- Experience in recruiting, assessing, enrolling, career coaching and placing participants/clients
- Strong customer service orientation and results orientation. Demonstrated sales skills.
- Proficient in use of Windows, Word, Excel and Outlook
- Team player with ability to collaborate effectively with partners and stakeholders
- Skilled at problem solving and project management
- Ability to execute events; strong logistical and organizational skills
- Professionalism and strong work ethic
- Must have reliable access to transportation and ability to travel locally and regionally.
- Additionally, must be available to attend a minimum of three (3) Instructor Train-the-Trainer sessions in other BankWork\$ affiliate cities during the first 3-6 months of the program (cities to be determined)

## **BankWork\$® Career Navigator Job Description**

**Note:** This position description is subject to change.

Provide employment preparation, job placement support and retention support to BankWork\$® program participants. Provide business outreach to all local banks to develop job opportunities for graduates by cultivating and maintaining relationships with bank recruiters and managers. As a member of the BankWork\$™ team, participate in the marketing of the program and assist in the recruitment and selection of candidates.

### **Placement and Retention**

- Coach students in developing job skills, resumes, cover letters etc. and provide students with job search information including assistance completing on-line applications to individual banks
- Maximize placement of program graduates in banking positions at banks and financial institutions
- Provide intensive support and coaching to participants who prove difficult to place.
- Build relationships with bank partner recruiters and promote candidacy of program participants to partner banks
- Show demonstrated ability to interact with people of different cultures and backgrounds

### **Post-employment support**

- Conduct a structured participant follow-up effort by reaching out to placed program participants to monitor their progress
- Provide appropriate coaching and support to maximize job retention of program participants
- Produce regular reports indicating participant retention and career and salary progression

### **Marketing Outreach**

- Work with community partners to recruit and screen applicants for program services
- Interview candidates for enrollment and administer selection process to determine eligibility

### **Additional Program Support**

- Train with BankWork\$® Instructor to be able to deliver the curriculum as needed
- Work with BankWork\$® national team on curriculum update process and training of new partners in other markets

## **BankWork\$® Career Navigator Requirements**

- 3+ years experience in employment services, human resources, social services or other related field
- Background in retail branch banking is a preferred
- Experience working with multi-cultural and/or disadvantaged populations
- Computer proficiency with Windows, Word., Excel, and Outlook
- Excellent interpersonal skills and ability to demonstrate corporate professionalism