

Title Page
Midlands Workforce Development Board
Bidders Response Package - Adult Dislocated Worker & Youth Activities and One-Stop Operator
MWDB 25-01

Name of Bidder: Career Team, LLC

Activity Proposed: Adult Dislocated Worker & Youth Activities and One-Stop Operator

Name of Signatory Official: Leah Olsheski - Procurement and Grants Specialist

Name of Contact Person: Anthony Terlizzi

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Shelton, CT 06484

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PLEASE NUMBER ALL PAGES OF RESPONSE PACKAGE.

SECTION 2: TECHNICAL RESPONSE PACKAGE

NAME OF BIDDER ORGANIZATION: Career Team, LLC

ADDRESS: 2 Enterprise Drive, Suite 424 Shelton, CT 06484

CONTACT PERSON: Anthony Terlizzi

TELEPHONE: 347-306-0180

TYPE OF AGENCY: GOVERNMENT PRIVATE NON-PROFIT PUBLIC NON-PROFIT
 SCHOOL DISTRICT PRIVATE FOR -PROFIT

PROPOSED SERVICE AREA: FAIRFIELD LEXINGTON RICHLAND

PROPOSED TARGET GROUP: ADULT DISLOCATED WORKER YOUTH
ACTIVITY PROPOSED:

CAREER SERVICES (A/DW)

- | | |
|---|---|
| <input checked="" type="checkbox"/> ELIGIBILITY DETERMINATION | <input checked="" type="checkbox"/> FOLLOW-UP SERVICES (12-MONTHS) |
| <input checked="" type="checkbox"/> OUTREACH, INTAKE, ORIENTATION | <input checked="" type="checkbox"/> COMPREHENSIVE ASSESSMENT |
| <input checked="" type="checkbox"/> INITIAL ASSESSMENT | <input checked="" type="checkbox"/> INDIVIDUAL EMPLOYMENT PLAN |
| <input checked="" type="checkbox"/> LABOR EXCHANGE SERVICES | <input checked="" type="checkbox"/> CAREER PLANNING, COUNSELING |
| <input checked="" type="checkbox"/> REFERRALS TO PROGRAMS | <input checked="" type="checkbox"/> SHORT-TERM PRE-VOC. SKILLS TRNG |
| <input checked="" type="checkbox"/> LABOR MARKET INFORMATION | <input checked="" type="checkbox"/> WORK EXPERIENCE OR INTERNSHIPS |
| <input checked="" type="checkbox"/> PERFORMANCE, COST INFO | <input checked="" type="checkbox"/> OUT OF AREA JOB SEARCH |
| <input checked="" type="checkbox"/> SUPPORTIVE SERVICES INFO | <input checked="" type="checkbox"/> FINANCIAL LITERACY SERVICES |
| <input checked="" type="checkbox"/> UI INFORMATION AND ASSISTANCE | <input checked="" type="checkbox"/> ENGLISH LANGUAGE ACQUISITION |
| <input checked="" type="checkbox"/> FINANCIAL AID INFORMATION | <input checked="" type="checkbox"/> WORKFORCE PREPARATION |
| <input checked="" type="checkbox"/> BUSINESS SERVICES | |

TRAINING SERVICES (A/DW)

- | | |
|--|---|
| <input checked="" type="checkbox"/> OCCUPATIONAL SKILLS TRAINING | <input checked="" type="checkbox"/> CUSTOMIZED TRAINING |
| <input checked="" type="checkbox"/> ON-THE-JOB TRAINING (OJT) | <input checked="" type="checkbox"/> JOB READINESS TRNG COMBO |
| <input checked="" type="checkbox"/> WORKPLACE TRAINING W/INSTRUCT. | <input checked="" type="checkbox"/> ADULT ED. & OCCUPATIONAL TRNG |
| <input checked="" type="checkbox"/> SKILL UPGRADING AND RETRAINING | <input checked="" type="checkbox"/> INCUMBENT WORKER TRNG |
| <input checked="" type="checkbox"/> ENTREPRENEURIAL TRAINING | <input checked="" type="checkbox"/> TRANSITIONAL JOBS |

YOUTH SERVICES

- | | |
|---|---|
| <input checked="" type="checkbox"/> ELIGIBILITY DETERMINATION | <input checked="" type="checkbox"/> SUPPORTIVE SERVICES |
| <input checked="" type="checkbox"/> OBJECTIVE ASSESSMENT | <input checked="" type="checkbox"/> ADULT MENTORING |
| <input checked="" type="checkbox"/> SERVICE STRATEGY DEV. | <input checked="" type="checkbox"/> FOLLOW-UP SERVICES |
| <input checked="" type="checkbox"/> TUTORING, STUDY SKILLS TRNG | <input checked="" type="checkbox"/> FINANCIAL LITERACY |
| <input checked="" type="checkbox"/> ALT. SECONDARY SCHOOL | <input checked="" type="checkbox"/> CASE MANAGEMENT |
| <input checked="" type="checkbox"/> SUMMER EMPLOYMENT | <input checked="" type="checkbox"/> POST-SECONDARY ED. PREP |
| <input checked="" type="checkbox"/> WORK EXPERIENCE | <input checked="" type="checkbox"/> ENTREPRENEURIAL SKILLS TRNG |
| <input checked="" type="checkbox"/> OCCUPATIONAL SKILL TRAINING | <input checked="" type="checkbox"/> BASIC & REMEDIAL ED. |
| <input checked="" type="checkbox"/> LEADERSHIP DEVELOPMENT | <input checked="" type="checkbox"/> OTHER INNOVATIVE ACT |
| <input checked="" type="checkbox"/> BUSINESS SERVICES | |

ONE-STOP OPERATOR


TYPE OF PROPOSAL: COST REIMBURSEMENT FIXED PRICE - PERFORMANCE BASED

PROPOSED SERVICE LEVEL: 1-300 301-600 601-900 901-1200
 1201 - 1500 1501-1800 1801 - 2100 2101+

PROPOSED COST FOR ALL ACTIVITIES: \$ 2,825,000

CERTIFICATION:

The information contained in this proposal fairly represents the Agency/ Organization/Business and its proposed operating plan and budget for the specified WIOA project. I acknowledge that I have read and understand the requirements of the Request for Proposal and that the Agency/Organization/Business is prepared to implement the project as specified in this proposal. I certify that I am authorized to sign this application on behalf of the Agency/Organization/Business submitting this application. This request is firm for a period of at least 90 days from the closing date for submission.

 Leah Olsheski - Procurement and Grants 04/10/2026
Signatory Official and Title Specialist Date

Executive Summary

Career Team, LLC submits this proposal to serve as the WIOA Adult, Dislocated Worker, and Youth service provider and One-Stop Operator for the Midlands Workforce Development Area. Founded in 1996, Career Team is a private, for-profit limited liability company with more than 550 staff nationwide and a portfolio of more than \$300 million in successfully managed public workforce contracts across 10 states and nearly 20 local workforce development systems. Career Team operates at the intersection of workforce services and workforce technology, and that combination is what defines what Career Team will bring to the Midlands. Career Team's mission is simple and enduring: to empower one person, start one career, and serve one family at a time.

Career Team proposes to deliver the full scope of WIOA Title I services for Adults, Dislocated Workers, and Youth across Fairfield, Lexington, and Richland Counties, operating within all three SC Works Centers, while also fulfilling the One-Stop Operator function as the managing partner of the SC Works Midlands system, ensuring seamless and coordinated service delivery across all center locations and partner programs.

Career Team's service model is built on a customer centered, no-wrong-door approach that connects every individual to the right combination of career services, training, work-based learning, supportive services, and employer connections based on their unique goals and barriers. What sets Career Team apart is how that model is delivered. Career Team operates a true hybrid service delivery system powered by Career Edge, our proprietary workforce technology platform, that combines the relationship-based strength of in-person case management with the accessibility and reach of round-the-clock digital engagement. Through Career Edge's mobile app, participants can complete intake, upload eligibility documents, access career readiness and professional development content, explore industries, build resumes using an AI Resume Builder, simulate interviews with a tool that generates job-specific questions and provides real-time feedback, and communicate securely with their Career Advisor from any device at any time. An AI-enabled assessment helps participants quickly clarify interests, strengths, and skill gaps, and an AI Career Coach guides them through career pathway exploration in a conversational, personalized format. For employers, Career Edge provides a dedicated Employer Portal and Employer Engagement Dashboard that support job posting, AI-driven candidate matching, pipeline tracking, and hiring workflow management, reducing administrative burden and positioning the SC Works system as a strategic talent partner. For staff and system leadership, Career Edge delivers real-time Performance Dashboards with visibility into enrollments, outcomes, expenditures, and documentation compliance across all three programs, and a Referral Tracker that creates auditable, closed-loop referral records so no customer is lost between systems or partner handoffs. For rural participants in Fairfield County in particular, Career Edge eliminates the access gap that has historically limited engagement with workforce services, while allowing Career Advisors to focus their in-person time on the deeper case management, barrier resolution, and employer connections that require a human relationship. All services will be delivered by a dedicated local team including a Project Director, Program Manager, Career Advisors for Adults, Dislocated Workers, and Youth, an Eligibility and Enrollment Specialist, a Business Services Associate, a Facilitator, a Quality Assurance Specialist, and a Project Accountant, supported by Career Team's regional and corporate infrastructure in operations, compliance, fiscal management, and quality assurance.

Our approach is grounded in demonstrated results, with recent performance highlights including in Pierce County, Washington, 111% of Youth, 113% of Adult, and 103% of Dislocated Worker enrollment targets; Credential Attainment of 109% in Merced County, California; and in Lincoln Trail, Kentucky, where Career Team has served as the direct service provider since July 2022, the Kentucky PY23 Comprehensive Monitoring Review found no WIOA program findings, no financial findings, and documented best practices in case management and documentation quality.

Beyond its track record, Career Team brings three distinct capabilities that directly serve the Midlands area's priorities.

1. Career Team's sector-driven employer engagement model connects participants to in-demand career pathways in Healthcare, Advanced Manufacturing, Information Technology, Construction and Skilled Trades, Logistics and Transportation, Hospitality and other priority clusters identified by the MWDB, ensuring training investments and work-based learning placements are grounded in real regional hiring demand.
2. Career Edge hybrid delivery model extends the reach of the SC Works system beyond the walls of the centers, providing participants with round-the-clock access to services and giving the MWDB a provider uniquely equipped to serve a geographically dispersed, three-county region without sacrificing service quality or compliance.
3. Career Team's integrated quality assurance and performance management infrastructure, including weekly performance tracking, monthly operations reviews, real-time Career Edge dashboards, and layered file review processes, ensures the MWDB has a partner that identifies risks early and manages to outcomes proactively rather than reactively.

Career Team is fully prepared to begin operations on July 1, 2026, to honor Right of First Refusal for case management and eligibility staff, and to deliver the high-quality, accountable, and community-rooted workforce services that Midlands-area residents, employers, and the MWDB deserve. We are honored by this opportunity and committed to being a long-term, trusted partner in the success of the Midlands workforce system.

Main Purpose - a mission statement or statement of intention

Our Why: At Career Team, our Mission, Vision, and Values are the operating principles that shape every decision we make. Our mission, to empower one person, start one career, and serve one family at a time, drives how we staff our centers, design our services, engage employers, and measure success. Our vision, to provide innovative solutions to complex social challenges by closing the opportunity divide, reducing unemployment, and eradicating poverty, defines the standard we hold ourselves to every day. As a private, for-profit limited liability company with more than 550 staff nationwide, Career Team has managed more than \$300 million in public workforce contracts and currently operates WIOA Title I Adult, Dislocated Worker, and Youth programs across Kentucky, Tennessee, Texas, Delaware, California, Louisiana, Maryland, New Mexico, and Washington State. That national footprint gives Career Team the operational infrastructure, cross-system perspective, and institutional knowledge that smaller or single-market providers cannot replicate, and it is the foundation upon which we propose to build an integrated, high-performing, and community-responsive workforce system across Fairfield, Lexington, and Richland Counties.

MISSION Empowering one person, starting one career and serving one family at a time.

VISION Provide innovative solutions to complex social challenges such as closing the opportunity divide, reducing unemployment and eradicating poverty.

VALUES

1 We are a team with family values	5 We provide an amazing customer experience
2 We are Passionate	6 We keep our word-Period
3 We provide WOW!	7 We Zag! (innovate)
4 We only ask what we are willing to do ourselves	8 We enthusiastically display our company & team spirit

Career Team's intent is clear and comprehensive: to serve as a single, fully accountable partner to the Midlands Workforce Development Board delivering Adult services, Dislocated Worker services, Youth services, Business Services, and One-Stop Operator functions under one unified contract, across all three counties, without gaps in service, duplication of effort, or confusion for customers or partners. Career Team is proposing to own the full scope of this work, to staff it with experienced and mission-aligned professionals, to manage it with rigorous internal accountability structures, and to deliver results that meet or exceed the performance standards negotiated by the State of South Carolina with the U.S. Department of Labor.

At the center of our service model is a commitment to access, ensuring that every eligible adult, dislocated worker, and young person in Fairfield, Lexington, and Richland Counties can find the SC Works system, enter it without confusion, and receive services that are individualized, high-quality, and aligned to both their personal goals and the realities of the Midlands labor market. We believe that a workforce center should function not as a government office but as a community anchor, a trusted, welcoming, and resource-rich environment where job seekers and employers alike know they will be treated with respect, served with urgency, and connected to practical solutions. That is the standard Career Team holds itself to in every system we operate, and it is the standard we commit to bringing to the Midlands.

Career Team's approach to workforce development is built on five interconnected pillars that define our service philosophy and operational culture:

People First. We treat every customer, whether a job seeker walking into a SC Works Center for the first time, a dislocated worker navigating the emotional and financial stress of an unexpected layoff, a young person trying to find direction, or an employer struggling to fill critical positions, as a VIP: a Very Important Person. This is not a customer service slogan. It is a behavioral standard that we reinforce through hiring, training, supervision, and performance management. Staff are expected to lead with empathy, communicate clearly, follow through on commitments, and treat every interaction as an opportunity to demonstrate that the public workforce system is worth trusting.

Career Pathways as the North Star. We believe that the goal of workforce services is not simply to place someone in a job. It is to connect them to a career pathway that leads to sustainable wages, advancement opportunity, and long-term economic self-sufficiency. In the Midlands, that means aligning our training investments, employer partnerships, and case management strategies with the priority industry sectors and in-demand occupations that reflect the region's economic strengths and growth trajectories. Every Individual Employment Plan we develop, every training referral we authorize, and every employer relationship we cultivate is evaluated against this standard: does this move the participant meaningfully forward on a career pathway that will support them and their family?

Employer Engagement as a Core Function. Workforce development cannot succeed without deep, sustained, and mutually beneficial relationships with employers. Career Team approaches business services not as an add-on to job seeker programs but as a parallel and equally essential function of the workforce system. Employers in the Midlands are both customers of the system and partners in its success. We engage them consultatively, understanding their hiring challenges, skill gaps, turnover patterns, and growth plans, and we respond with practical solutions that include qualified candidate referrals, work-based learning opportunities, On-the-Job Training agreements, rapid response support, and sector-specific workforce strategies. The strength of our employer engagement directly determines the quality of employment outcomes for our participants, and we invest in it accordingly.

Human-Centered, Technology-Enabled Service Delivery. Career Team's service model is human-centered and technology-enabled, and Career Edge, Career Team's proprietary workforce platform, is what makes that combination

possible at scale. Career Edge is deployed across Career Team's workforce operations to expand customer access, strengthen staff efficiency, and provide system-wide visibility into participation, performance, and outcomes, and Career Team proposes to bring the full capabilities of the platform to the Midlands.

For participants, Career Edge delivers a guided, personalized experience accessible from any smartphone, 24 hours a day. Through the mobile app, customers can complete intake, upload documents, schedule appointments, and communicate directly with their Career Advisor. The platform includes career readiness and professional development content with industry exploration tools, an AI Resume Builder, and an Interview Simulation Trainer that generates job-specific questions and provides real-time feedback on communication and readiness. An AI-enabled assessment surfaces interests, strengths, and skill gaps early in the service process, and an AI Career Coach guides customers through career exploration and planning in a conversational, on-demand format that keeps them engaged and moving forward between in-person visits. For employers, the Employer Portal supports job posting, AI-driven candidate matching, and hiring workflow management, while the Employer Engagement Dashboard gives both employers and Career Team's Business Services staff real-time visibility into pipeline activity, referral sources, and time-to-fill metrics. For staff and system leadership, real-time Performance Dashboards surface enrollment trends, outcome projections, expenditure tracking, and documentation compliance across all three programs and all three counties, and the Referral Tracker creates auditable, closed-loop records that ensure no customer is lost between systems or partner handoffs. In rural and transportation-challenged communities across Career Team's national footprint, Career Edge has consistently reduced access barriers, improved staff productivity, and strengthened accountability, outcomes that are directly relevant to the Midlands and especially to Fairfield County's rural service challenge.

Performance Accountability as a Non-Negotiable. Career Team operates within a management-by-objectives framework in which performance expectations are established at the contract level, translated into operational Key Performance Indicators, and cascaded into clearly defined goals that are continuously tracked, evaluated, and refined. This approach is not static or report-driven; it is powered by an integrated performance management ecosystem that combines predictive intelligence, internal tracking, and structured leadership engagement to ensure performance is actively managed in real time.

At the center of this model is Career Edge's Performance Dashboard, which provides leadership with a comprehensive, forward-looking view of system performance across the program and projected outcomes. Rather than relying on lagging indicators, the platform applies trend analysis and predictive modeling informed by real-time service activity and engagement patterns to generate enrollment pacing projections, outcome likelihoods, and expenditure alignment insights. These capabilities allow Career Team to identify emerging risks early and take corrective action before those risks impact contract performance.

This predictive visibility is reinforced through Career Team's internal performance tracking structure, which ensures that data is consistently translated into action. Performance is reviewed on a recurring basis through structured reporting and leadership cadences that provide continuous insight into progress against goals. When variances are identified, they are addressed immediately through targeted interventions such as focused outreach, service acceleration, or strategic adjustments in resource deployment. This disciplined approach ensures that performance gaps are not only identified quickly, but resolved efficiently.

Performance Dashboard

Report for WIOA - Adult, WIOA - CW, WIOA - Youth

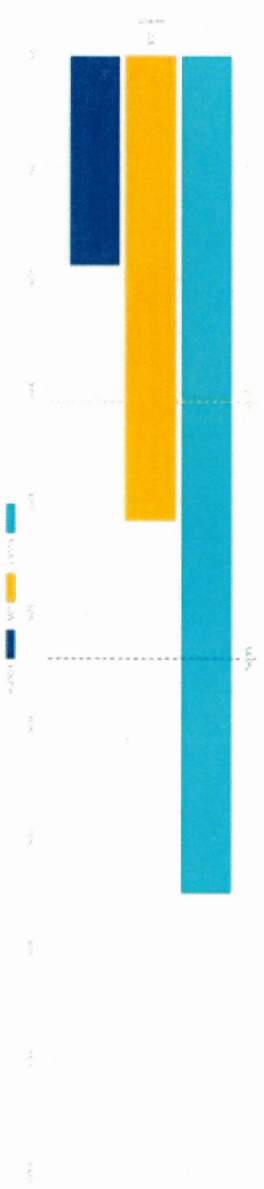
Report | Import Data | Set Goals

From

To: 2025 July | Measurable: Sales Call

WIOA - Adult, WIOA - CW, WIOA - Youth

Quarterly Performance Trend



WIOA Outcome Measures

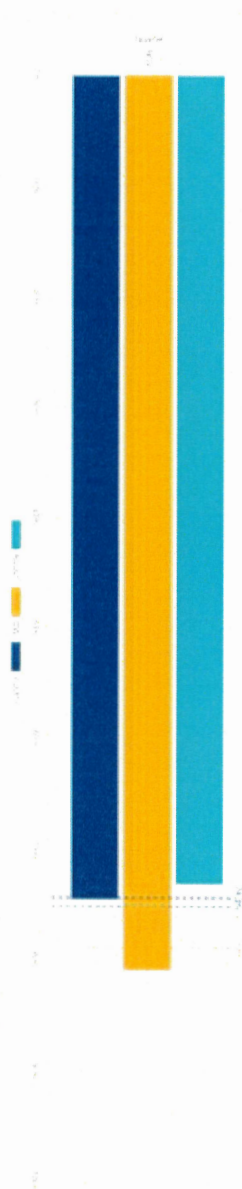
Metric	Program	Status	PBR Achieved	CUR PER	CUR TRGT	NUM	DEN
Measurable: Sales Call	Adult	OK	100%	75%	75%	1	1
Measurable: Sales Call	CW	OK	100%	75%	75%	5	5
Measurable: Sales Call	Youth	NO	0%	0%	0%	0	0

From

To: 2025 November | Employment Rate - 2nd Quarter

WIOA - Adult, WIOA - CW, WIOA - Youth

Quarterly Performance Trend



WIOA Outcome Measures

Metric	Program	Status	PBR Achieved	CUR PER	CUR TRGT	NUM	DEN
Employment Rate - 2nd Quarter	Adult	NO	0%	75%	0%	0	0
Employment Rate - 2nd Quarter	CW	NO	0%	75%	0%	0	0
Employment Rate - 2nd Quarter	Youth	NO	0%	75%	0%	0	0

Contract performance measures, enrollment targets, and internal customer service indicators are compiled and reviewed weekly. Direct Service Report (DSR) results are reviewed by corporate leadership and used by local leaders to translate targets into role-level priorities for Career Advisors, employer services staff, and support teams. *Example:* In the last three months, the DSR showed Adult credential attainment trending slightly below target, with two participants needed to meet the performance threshold. Leadership communicated the gap to the Training Coordinator and Career Advisors, initiating targeted outreach within 48 hours to re-engage participants and accelerate. Below please see Career Team's Weekly project by project DSR report.

	A	B	C	D	E	F	G	H
1	Last Updated OR nothing to update	3/23/2026						
2	Week Ending	7/4	7/11	7/18	7/25	8/1	8/8	8/15
3	Benchmark	Actual	Actual	Actual	Actual	Actual	Actual	Actual
4	Adult Enrollments	2	2	3	3	2	1	1
5	DW Enrollments	0	0	0	0	1	1	1
6	Youth Enrollments	0	1	0	0	1	4	2
7	QUEST Enrollments	4	2	2	3	3	4	0
8	Severe Storms Enrollments							
9	Participant Spend Actual Paid all program				\$21,759.00			

Contract Measures				Jul-2025		Aug-2025	
SCKY	Frequency of Update to DSR Reports		Annual Target	Monthly Goal	Actual Achieved	Monthly Goal	Actual Achieved
Adult Enrollments	Monthly		40	3	10	3	5
DW Enrollments	Monthly		15	1	0	1	3
Youth Enrollments	Monthly		40	3	1	3	13
QUEST Enrollments	Monthly		10	5	11	5	7
Severe Storms Enrollments	Monthly		24				

Contract Measures				Jul-2025		Aug-2025	
Career Edge Usage			Annual Target	Monthly Goal	Actual Achieved	Monthly Goal	Actual Achieved
User Registrations	Monthly		1200	100	146	100	168
Resumes Created	Monthly		600	50	96	50	120
Resumes Uploaded	Monthly		120	10	19	10	20
Modules	Monthly		60	5	0	5	3
Assessments			300	25	41	25	51

Monthly operational performance reviews further strengthen this model by providing a comprehensive assessment of performance, expenditures, staffing, system utilization, and compliance priorities. These reviews incorporate both current performance data and forward projections, enabling leadership to anticipate trends and align operational strategies accordingly. Insights from these reviews are translated into clear expectations and priorities, ensuring alignment between system-level goals and day-to-day service delivery.

Performance accountability is embedded throughout the organization through clearly defined, outcome-driven expectations aligned to enrollments, credential attainment, measurable skill gains, employment outcomes, timeliness, and documentation quality. These expectations are reinforced through structured supervision, ongoing coaching, and consistent performance discussions, creating a culture in which accountability is understood, measured, and supported at every level.

Senior leadership maintains active oversight through recurring executive and regional performance reviews, ensuring alignment across all projects and enabling rapid response to emerging trends. These engagements are complemented by regular cross-functional coordination that brings together program, fiscal, compliance, and talent functions to ensure that performance management is holistic, aligned, and responsive to changing conditions.

We do not wait for quarterly reports to identify performance risk. Through the integration of predictive performance intelligence, internal tracking systems, and structured leadership engagement, Career Team manages performance proactively, identifying risks earlier, responding faster, and maintaining consistent alignment with contract goals.

In the Midlands, this means the Midlands Workforce Development Board will have a partner that delivers transparent, timely, and accurate visibility into system performance while actively managing toward outcomes. Career Team brings not only reporting capability, but a disciplined, data-driven approach that anticipates challenges, implements solutions quickly, and ensures that performance expectations are consistently met or exceeded.

Taken together, these pillars define what Career Team means when it says it intends to operate the Midlands workforce system. This is not a collection of programs, but a fully integrated service ecosystem that aligns Adult, Dislocated Worker, and Youth services with One-Stop Operator functions and Business Services into a single, coherent, and accountable system. The Midlands Workforce Development Board will have in Career Team a partner that shows up fully, performs transparently, adapts quickly, and remains grounded in the mission: one person, one career, one family at a time.

Goals/Objectives/Performance Outcomes - Describe the recruitment process and plan to recruit while completing the service plan for WIOA participants. This should include the number of participants to be served and projected performance levels of performance.

Career Team enters the Midlands Workforce Development Area with a clear and measurable set of goals that align with the performance expectations established by the State of South Carolina, the strategic priorities of the Midlands Workforce Development Board, and the real-world needs of job seekers, dislocated workers, youth, and employers across Fairfield, Lexington, and Richland Counties. Our goals are not aspirational statements. They are operational commitments backed by staffing plans, technology infrastructure, case management protocols, employer engagement strategies, and a performance management culture that identifies risk early and responds before outcomes are affected.

Participant Service Goals

Career Team proposes to serve the following participant populations during Program Year 2026, inclusive of participants transferring from the current program year and new enrollments:

In the Adult program, Career Team will accept the transfer of approximately 185 participants currently enrolled and will enroll a minimum of 130 additional Adults during PY2026, for a total Adult caseload of no fewer than 315 participants. In the Dislocated Worker program, Career Team will accept approximately 50 transferring participants and enroll a minimum of 100 new Dislocated Workers, for a total Dislocated Worker caseload of no fewer than 150 participants. In the Youth program, Career Team will accept approximately 115 transferring youth and enroll a minimum of 100 new Youth participants, for a total Youth caseload of no fewer than 215 participants. Across all three programs, Career Team commits to serving a minimum of 680 unduplicated participants during PY2026, with the expectation that

enrollment activity will be front-loaded in the program year to ensure sufficient time in services, training completion, and outcome achievement before performance measurement windows close.

These participant targets reflect the minimum service levels the MWDB has established for the Midlands area. Career Team's operational planning, staffing model, and budget design are built to meet and where possible exceed these targets, consistent with available funding and the MWDB's expenditure expectations. Career Team understands that the State of South Carolina expects local areas to reach a minimum of 70% expenditure of total available funds each program year and that the MWDB expects contractors to expend no less than 80% of their total budget annually, with the goal of 100% expenditure within two years. Career Team's enrollment and service targets are calibrated to support full expenditure of the \$2,825,000 planning estimate across the Adult, Dislocated Worker, and Youth funding streams.

Projected Performance Outcomes

Career Team commits to meeting or exceeding the performance measures negotiated by the State of South Carolina with the U.S. Department of Labor for Program Year 2025, which serve as the applicable benchmarks for PY2026 planning purposes. The table below reflects Career Team's projected performance outcomes by program and measure:

Adult Participants

Measure	Career Team Projection	State Rate
Employment Rate (Q2)	79%+	78.5%
Employment Rate (Q4)	79%+	78.3%
Median Earnings (Q2)	\$7,500+	\$7,300
Credential Attainment	68%+	67.5%
Measurable Skill Gains	67%+	66.3%

Dislocated Worker Participants

Measure	Career Team Projection	State Rate
Employment Rate (Q2)	83%+	82.0%
Employment Rate (Q4)	82%+	81.7%
Median Earnings (Q2)	\$9,200+	\$8,949
Credential Attainment	67%+	65.8%
Measurable Skill Gains	73%+	72.3%

Youth Participants

Measure	Career Team Projection	State Rate
Employment Rate (Q2)	79%+	78.5%
Employment Rate (Q4)	79%+	78.9%

Measure	Career Team Projection	State Rate
Median Earnings (Q2)	\$5,500+	\$5,360
Credential Attainment	59%+	57.9%
Measurable Skill Gains	63%+	62.0%

Career Team's projected performance levels represent modest but meaningful improvements over state negotiated baselines. These projections are grounded in our operational experience, our internal performance management systems, and our demonstrated ability to maintain strong outcomes across diverse workforce environments. They are not ceiling targets. Career Team's internal Key Performance Indicators will be set above these thresholds so that the organization is managing toward performance levels that provide a buffer against natural variation in participant outcomes, labor market fluctuations, and enrollment timing.

Recruitment Process and Plan

Meeting participant and performance targets in the Midlands region begins with a disciplined, multi-channel, and community-rooted recruitment strategy that is both physically present and digitally accessible. Career Team does not wait for participants to find the SC Works Centers. We build the pipelines, referral networks, and community presence that bring eligible individuals into the system—and we extend that reach through technology that allows individuals to engage immediately, from anywhere.

Career Team's recruitment strategy is organized around four core approaches that operate simultaneously and reinforce one another throughout the program year.

Partner-Driven Referral Development.

Career Team will establish and maintain structured referral relationships with the organizations most likely to be in contact with WIOA-eligible individuals across Fairfield, Lexington, and Richland Counties. This includes the South Carolina Department of Employment and Workforce, the South Carolina Department of Social Services, Vocational Rehabilitation, Adult Education providers, community colleges such as Midlands Technical College and Orangeburg-Calhoun Technical College, community-based organizations, faith-based organizations, housing authorities, reentry providers, and healthcare and social service agencies.

These partnerships are formalized through defined referral protocols, designated points of contact, and clearly documented pathways into services. Career Team tracks referral volume, source effectiveness, and conversion rates through Career Edge, allowing leadership to continuously evaluate which partnerships are driving enrollments and where additional outreach investment is required. This ensures recruitment is not anecdotal, but measurable, accountable, and continuously optimized.

Community-Based Outreach and Local Access Points.

Career Team recognizes that many individuals—particularly those facing barriers to employment—are unlikely to initiate contact with the workforce system independently. In the Midlands, this is especially true in Fairfield County, where rural geography and transportation limitations require a deliberate, community-based presence.

To address this, Career Team implements a structured Local Access Point model that brings services directly into the

community. Staff establish regular, scheduled presence at trusted locations such as public libraries, community centers, faith-based organizations, housing programs, and partner agencies. These are not ad hoc outreach efforts; they are consistent, staffed extensions of the SC Works system where individuals can receive initial screening, complete interest forms, and be directly connected to enrollment services.

This model has demonstrated measurable success. In Lincoln Trail, Kentucky, Career Team participated in 171 community outreach events in a single program year and established staffed access points across multiple community locations, creating a sustained presence that expanded access and increased enrollments among populations that had not previously engaged with workforce services.

Digital Outreach and Engagement through the Career Edge Mobile Application.

Career Team extends its recruitment strategy beyond physical locations through the Career Edge mobile application, which serves as a digital front door to the workforce system particularly for youth and other mobile-first populations.



The mobile app allows individuals to immediately connect to services through QR codes embedded in outreach materials, links distributed by partner organizations, and targeted social media and text-based campaigns. A prospective participant can express interest, begin intake, and take the first step into services directly from their smartphone without needing to visit a center or make a phone call. This low-barrier entry point is especially critical for out-of-school youth and disconnected individuals who may not engage through traditional channels.

Once connected, the app supports ongoing engagement through push notifications and in-app messaging that promote hiring events, workshops, and training opportunities. For youth, this creates a consistent and familiar communication channel that aligns with how they already receive and respond to information. Interactive tools such as career exploration, resume building, interview practice, and guided career coaching further increase engagement and

encourage continued participation after initial contact.

For Adult and Dislocated Worker populations, the mobile app reduces common barriers such as transportation limitations and scheduling conflicts by allowing individuals to engage with the workforce system on their own time. Individuals can submit information, communicate with staff, and stay connected to opportunities without needing to return repeatedly to a physical location.

From a recruitment perspective, the platform also strengthens outreach effectiveness by providing visibility into how individuals are entering the system whether through QR codes, partner referrals, or digital campaigns allowing Career Team to continuously refine outreach strategies and ensure that all recruitment channels are producing measurable enrollment activity.

Rapid Response and Layoff-Driven Enrollment.

Career Team will work closely with regional partners to monitor layoff activity and respond quickly to dislocation events. Through coordination with employers and system partners, Career Team deploys enrollment and outreach capacity to support impacted workers through on-site orientations, group enrollment sessions, and expedited connection to services. This ensures Dislocated Workers are engaged quickly and efficiently during critical transition periods.

Schools and Youth Pipeline Development.

Youth recruitment is supported through structured partnerships with school districts, alternative education programs, juvenile justice partners, foster care programs, housing providers, and community-based organizations. Career Team collaborates with school counselors, Career and Technical Education coordinators, and dropout prevention programs to identify eligible in-school youth, while targeted outreach strategies focus on connecting with out-of-school youth populations.

The Career Edge mobile application further strengthens this approach by providing a direct engagement channel for youth who may not respond to traditional outreach methods. Combined with in-person engagement and partner referrals, this creates multiple, reinforcing entry points into the workforce system.

Career Team's experience demonstrates the impact of data-driven youth recruitment. In Lincoln Trail, targeted outreach aligned with high-need census tracts resulted in a 25 percent increase in out-of-school youth enrollments, illustrating how intentional, localized strategies can expand access for the most disconnected young people.

From Recruitment to Enrollment: The Service Plan Process

Recruitment does not end at first contact. Career Team's model is designed to move individuals efficiently from initial awareness through eligibility determination, enrollment, and service planning without unnecessary delays. Career Team targets an intake-to-enrollment timeline of no more than five business days for individuals with complete documentation, while maintaining engagement for those still gathering required materials.

Upon enrollment, participants complete a comprehensive assessment that informs the development of an Individual Employment Plan for Adults and Dislocated Workers or an Individual Service Strategy for Youth. These plans define employment goals, career pathways aligned with the Midlands labor market, required services, and supportive needs

that must be addressed to ensure success.

Internal Performance Benchmarks

Beyond the state negotiated performance measures, Career Team will establish internal operational benchmarks that serve as leading indicators of performance and allow the team to identify and address risk well before it affects reported outcomes. These internal benchmarks will include average days from application to enrollment, percentage of enrolled participants with a completed and current Individual Employment Plan or Individual Service Strategy, percentage of participants actively engaged in a service activity at any given point, training enrollment rates as a percentage of eligible participants, credential attainment rates at the midpoint of the program year, work-based learning participation as a percentage of youth expenditures, follow-up contact completion rates, and monthly expenditure pacing against budget. These internal indicators are reviewed weekly by the Project Director and monthly in the formal Monthly Operations Review process that Career Team conducts with its regional and corporate leadership. When internal benchmarks fall below target, Career Team activates a structured corrective action process that assigns ownership, establishes a timeline, and tracks progress to resolution. This proactive internal management structure is what allows Career Team to consistently deliver on its performance commitments to workforce boards across the country, and it is what the Midlands Workforce Development Board can expect as its partner under this contract.

Target Group(s) - Identify any target groups and the number of each to be served.

Career Team proposes to serve four target populations across Fairfield, Lexington, and Richland Counties: **WIOA Adults, Dislocated Workers** (including Displaced Homemakers), **Out-of-School Youth**, and **In-School Youth**. Our service model is tailored to the distinct statutory requirements, customer expectations, and barriers of each population, while maintaining an integrated, no-wrong-door system that ensures seamless customer flow across all three counties.

WIOA Adults - Projected to Serve: 315 (185 transferring from PY25 + 130 new enrollments)

Career Team recognizes that WIOA Adult participants enter the system with a wide range of needs — from job readiness and digital literacy to occupational skills training, career pathway exploration, and individualized employment planning. Many are simultaneously navigating responsibilities such as caregiving, transportation challenges, and housing instability. Career Team's service model responds to these realities through flexible, barrier-aware delivery that connects each individual to the services and supports needed to achieve self-sufficient employment.

Priority of service will be extended first to **Veterans and eligible spouses**, consistent with state and federal requirements. Beyond Veteran priority, Career Team will give priority to recipients of public assistance, low-income individuals, and individuals who are basic skills deficient. Career Team has current experience delivering WIOA Adult services across multiple workforce systems — including Lincoln Trail, Upper Cumberland, Northern Area, Workforce Central, Orange County, and others — consistently achieving strong outcomes in entered employment, credential attainment, and measurable skills gains.

Dislocated Workers (including Displaced Homemakers) - Projected to Serve: 150 (50 transferring from PY25 + 100 new enrollments)

Career Team understands that Dislocated Workers come to the system with urgency, financial pressure, and the need to translate prior work experience into new labor market opportunities. This population includes individuals who have

been terminated or laid off, received WARN Act notices, experienced permanent facility or plant closures, are self-employed but unemployed due to economic conditions or natural disaster, or qualify as Displaced Homemakers. Veterans are given priority.

Career Team's approach emphasizes rapid re-employment through comprehensive assessment, targeted reskilling, and strong connections to in-demand training. We bring demonstrated experience with co-enrollment, TAA coordination, Rapid Response, and comprehensive case management for Dislocated Workers. Monitoring at Workforce Central documented Career Team's strong understanding of WIOA Dislocated Worker eligibility, enrollment requirements, and service delivery — reflecting our ability to respond with urgency, empathy, and results-driven strategies.

Out-of-School Youth (OSY) — Primary Focus - Projected to Serve: approximately 75 youth

Out-of-school youth are the primary focus of Career Team's youth program design, and at least 75% of all WIOA Youth funds will be dedicated to this population, consistent with federal requirements. Career Team will prioritize youth ages **17–24** who are not enrolled in school and who face one or more of the following barriers: school dropout status, involvement in the juvenile or adult justice system, homelessness or foster care involvement, pregnancy or parenting, disability, or low-income status.

Career Team brings direct, current experience operating WIOA Youth programs focused on out-of-school youth — including in Lincoln Trail, Delaware, Greater Memphis, Jefferson Parish, Upper Cumberland, and Workforce Central. Our data-driven outreach strategy, utilizing qualifying census tracts and community partner networks, has produced measurable results — including a **25% increase in out-of-school youth enrollments** in Lincoln Trail. Monitoring at Workforce Central found Career Team recorded **94% of out-of-school youth services within seven days of service delivery in PY22**, and maintained above a **95% rate in PY23**.

Services for OSY will be structured around individualized assessment, Individual Service Strategies, work-based learning tied to career pathways, all 14 required youth program elements, and a minimum of 12 months of follow-up services. Outreach will extend into community-based partner locations; libraries, re-entry programs, juvenile justice partners, and community events to reach young people where they are.

In-School Youth (ISY) - Projected to Serve: approximately 25

Career Team will also serve in-school youth ages **17–21** who are low-income and face one or more barriers, including basic skills deficiency, English language learning needs, offender status, homelessness, disability, or pregnancy or parenting. ISY services will be capped at 25% of total youth funding and will focus on career awareness, labor market information, tutoring, leadership development, work-based learning opportunities including summer employment and internships, and preparation for postsecondary education and training. Career Team will develop informational sessions for in-school youth that provide practical, accessible information about the local labor market, career pathways, and connections to education and training opportunities in the Midlands area.

Cross-Cutting Priority Populations

Across all four target groups, Career Team will apply priority of service and individualized, barrier-responsive strategies to reach: Veterans and eligible spouses; justice-involved individuals; individuals in recovery from substance use;

individuals without a high school diploma or GED; people with disabilities; individuals with limited English proficiency or cultural barriers; low-income individuals and public assistance recipients; and older workers. Career Team's Career Edge platform provides 24/7 mobile-first access to intake, career readiness content, assessments, and case management — reducing the impact of transportation barriers, limited broadband, and geographic distance across Fairfield, Lexington, and Richland Counties.

Total Projected Participants: 680 (315 Adults-185 carry - over | 150 Dislocated Workers - 50 carry-over | 100 Youth [~75 OSY / ~25 ISY - 115 carry-over])

Staffing Plan - describe the range of activities to be performed by the staff. Include a job title and job description for each WIOA funded position proposed along with any minimum qualifications. If the identity of the staff member is known, please include his/her resume. If the position has no staff member identified, please note. It is imperative that the successful Bidder employ professional staff that is committed to staying current in all areas associated with his/her job responsibilities. Right of First Refusal of case management and eligibility staff will be required for any Bidder during the contract negotiations.

Career Team proposes a staffing structure designed to ensure seamless service delivery, strong compliance, and clear accountability across all WIOA-funded activities in Fairfield, Lexington, and Richland Counties. The proposed positions span executive oversight, program operations, direct participant services, employer engagement, fiscal management, and quality assurance, collectively covering the full scope of services required under this solicitation. The titles are:

- Regional Director
- Project Director
- One-Stop Operator
- Program Manager
- Eligibility & Enrollment Specialist
- Career Advisor — Adult/Dislocated Worker
- Career Advisor — Youth
- Business Services Associate
- Facilitator
- Quality Assurance Specialist
- Project Accountant

Regional Director The Regional Director provides executive oversight of the Midlands project and serves as Career Team's senior organizational point of contact for the MWDB. This position monitors contract performance across all three programs, ensures alignment between local operations and corporate standards, participates in Board meetings and quarterly performance reviews, and activates corporate resources when the local project requires additional support in compliance, fiscal management, or human resources. The Regional Director also approves Monthly Operations Reviews and ensures that corrective action plans are implemented and resolved in a timely manner. *Minimum qualifications:* Bachelor's degree required; master's degree preferred. Minimum of eight years of experience managing publicly funded workforce or human services programs, including supervisory experience over multi-site operations.

Project Director The Project Director serves as the primary local contact for the MWDB and holds day-to-day accountability for all program operations, staffing, performance, compliance, and reporting across Fairfield, Lexington, and Richland Counties. Key activities include overseeing all three program populations, managing the local team, conducting weekly performance reviews using Career Edge dashboards and the Direct Services Report, maintaining open communication with MWDB staff, and ensuring all contract deliverables are met on time and within budget. The Project Director also leads partner coordination, approves participant expenditures, and drives corrective action when internal benchmarks fall below target. *Minimum qualifications:* Bachelor's degree required; graduate degree preferred. Minimum of five years of progressively responsible experience in workforce development program management, including direct supervision of staff and experience managing federal performance measures.

One-Stop Operator The One-Stop Operator manages the operational infrastructure of all three SC Works Centers as the coordinating entity of the SC Works Midlands system, distinct from Career Team's direct service provider role. Activities include convening required partner meetings at minimum quarterly, maintaining and updating the Operations Manual for each center, enforcing center operational policies on hours, data confidentiality, and service delivery standards, monitoring customer flow and satisfaction, and ensuring ADA and Equal Opportunity compliance across all locations. The One-Stop Operator also manages partner coordination, resolves operational gaps between co-located programs, and provides regular activity reports to the MWDB. *Minimum qualifications:* Bachelor's degree required. Minimum of four years of experience in workforce center operations or One-Stop management, with demonstrated knowledge of WIOA required partner programs and integrated service delivery.

Program Manager The Program Manager supports the Project Director in managing day-to-day service delivery operations across all three programs and serves as the operational lead for service quality, case management standards, and performance tracking. Responsibilities include monitoring individual caseloads for compliance and documentation quality, reviewing IEPs and Individual Service Strategies for completeness and goal alignment, tracking credential attainment and employment outcomes at the midpoint of the program year, coordinating training referrals and ITA approvals, and liaising with the QA Specialist on file review findings. The Program Manager also develops and delivers staff training on WIOA policy, SC Works procedures, and program-specific requirements. *Minimum qualifications:* Bachelor's degree required. Minimum of three years of experience in WIOA program operations or workforce case management supervision, with demonstrated knowledge of federal performance measures and eligibility requirements.

Eligibility & Enrollment Specialist The Eligibility & Enrollment Specialist focuses exclusively on intake, eligibility determination, and documentation collection for all three program populations, allowing Career Advisors to concentrate their time on service delivery and career planning. Activities include conducting initial interviews with prospective participants, reviewing and verifying eligibility documentation, entering enrollment records into SCWOS, maintaining documentation checklists, tracking pending cases and following up with applicants who have incomplete files, and ensuring all eligibility determinations are accurate, timely, and audit-ready. This specialization is designed to achieve an intake-to-enrollment timeline of no more than five business days for individuals with complete documentation. *Minimum qualifications:* Associate's degree required; bachelor's degree preferred. Minimum of two years of experience in eligibility determination, case intake, or benefits administration in a publicly funded program, with strong attention to detail and knowledge of documentation requirements.

Career Advisor — Adult/Dislocated Worker Career Advisors serving Adults and Dislocated Workers are the primary point of contact for enrolled participants and are responsible for delivering the full continuum of individualized career services from enrollment through follow-up. Core activities include conducting comprehensive assessments of skills,

interests, and barriers; developing and maintaining Individual Employment Plans aligned to the Midlands labor market; providing career counseling and job search assistance; coordinating occupational training referrals and monitoring participant progress through ITA completion; developing and placing participants in work-based learning opportunities including OJT and work experience; connecting participants to supportive services; and providing a minimum of 12 months of follow-up contact after exit. Career Advisors maintain at least bi-weekly touchpoints with active participants, documented in SCWOS. *Minimum qualifications:* Bachelor's degree required. Minimum of two years of experience in workforce development, career counseling, case management, or a related human services field. CDF or CWDP certification preferred; required by the third quarter of program operation if not already held.

Career Advisor — Youth The Youth Career Advisor delivers WIOA Title I Youth services to both out-of-school and in-school youth participants across all three counties, with a primary focus on out-of-school youth ages 17–24 facing multiple barriers. Activities include outreach and recruitment through community-based locations, schools, and partner organizations; conducting objective assessments and developing Individual Service Strategies; providing case management, mentoring, and regular touchpoints; coordinating all 14 required youth program elements including tutoring, leadership development, financial literacy, and career exploration; developing and overseeing work-based learning placements including paid work experience, internships, and pre-apprenticeships; and delivering a minimum of 12 months of follow-up services after exit. The Youth Career Advisor also maintains close coordination with juvenile justice partners, foster care programs, and school counselors to ensure pipeline development and timely engagement. *Minimum qualifications:* Bachelor's degree required, preferably in social work, education, counseling, or a related field. Minimum of two years of experience working with youth populations, preferably in a workforce, education, or youth development setting. CDF or CWDP certification preferred; required by the third quarter of program operation if not already held.

Business Services Associate The Business Services Associate serves as Career Team's primary employer-facing representative, responsible for building and maintaining relationships with businesses across Healthcare, Advanced Manufacturing, Information Technology, Construction and Skilled Trades, Logistics and Transportation, and other priority sectors identified by the MWDB. Activities include conducting employer outreach and consultative engagement, developing job orders and managing candidate referrals, negotiating and administering OJT and work experience agreements, organizing hiring events and sector-based career fairs, representing the SC Works system to Chambers of Commerce and industry organizations, and providing labor market data and sector intelligence to Career Advisors to inform IEP development and training referrals. The Business Services Associate conducts regular Match Meetings with Career Advisors to align the participant pipeline to active employer opportunities. *Minimum qualifications:* Bachelor's degree required. Minimum of two years of experience in business development, employer relations, workforce services, or a related field, with demonstrated ability to build and sustain professional relationships with employers across multiple industry sectors.

Facilitator The Facilitator designs and delivers group workshops and structured learning activities for Adult, Dislocated Worker, and Youth participants across all three SC Works Centers, supplementing individual case management with skills-building content delivered in person, virtually, and in hybrid formats. Workshop topics include job readiness and career exploration, resume development, interview preparation, digital literacy and computer skills, financial literacy and budgeting, and labor market information. The Facilitator also supports career pathway sessions and Career Boost events that bring together training providers, employers, and job seekers, and coordinates with Career Advisors to tailor workshop content to the specific needs of current program participants. *Minimum qualifications:* Associate's degree required; bachelor's degree preferred. Minimum of two years of experience facilitating workforce readiness, adult education, or career development workshops, with strong public speaking and curriculum delivery skills.

Quality Assurance Specialist The Quality Assurance Specialist is responsible for internal monitoring, file review, and compliance oversight across all three programs and all participant populations, working in coordination with Career Team's corporate Director of Quality Assurance. Activities include conducting monthly random case file audits using standardized review tools, verifying that eligibility documentation, case notes, IEPs, service records, and outcome data meet federal, state, and MWDB requirements; reviewing documentation for direct participant expenditures including ITAs, work experience wages, and supportive services; tracking error rates and generating monitoring reports; facilitating corrective action when deficiencies are identified; and supporting staff training on documentation standards and compliance requirements. The QA Specialist also conducts self-audit reviews and ensures records retention and data security protocols are followed at all locations. *Minimum qualifications:* Bachelor's degree required. Minimum of two years of experience in program compliance, quality assurance, or monitoring in a WIOA or publicly funded human services environment, with strong analytical skills and knowledge of documentation requirements.

Project Accountant The Project Accountant manages day-to-day fiscal operations for the Midlands contract under the direction of the Project Director and with direct access to Career Team's corporate fiscal team. Activities include processing and tracking all project expenditures in Workday and SCWOS, preparing and submitting monthly invoices to the MWDB with complete supporting documentation, managing ITA and supportive service authorizations, reconciling participant-level expenditures against approved plans and program rules, maintaining timekeeping records and payroll coding for all project staff, developing monthly expenditure forecasts against the approved budget, and preparing the annual financial closeout report. The Project Accountant serves as the primary liaison with MWDB fiscal staff on all invoicing, reporting, and financial compliance matters. *Minimum qualifications:* Associate's degree in accounting or finance required; bachelor's degree preferred. Minimum of two years of experience in fiscal management or accounting for a publicly funded program, with demonstrated knowledge of allowable cost principles under 2 CFR 200 and experience with federal or state grant financial reporting.

Career Team's staffing model is intentionally designed to support rapid engagement and timely enrollment, ensuring participants move quickly from initial contact into services. The dedicated Eligibility & Enrollment Specialist plays a critical role in this process by focusing exclusively on intake, eligibility determination, and documentation collection. This specialization allows Career Advisors to concentrate on service delivery and career planning while ensuring that eligibility is processed efficiently, accurately, and without unnecessary delays. This approach reduces time-to-enrollment, improves participant experience, and maximizes the time available for participants to achieve outcomes.

Supporting this structure is Career Team's broader operational support team, including quality assurance, fiscal, and administrative functions, which provide behind-the-scenes coordination that allows frontline staff to remain focused on participants and employers. This includes oversight of documentation quality, compliance monitoring, data integrity, fiscal tracking, and reporting, ensuring that program operations remain efficient, compliant, and aligned with contract requirements without overburdening direct service staff.

Full job descriptions for each position, including core responsibilities and minimum qualifications, are included as attachments to this proposal. Resumes are included for all positions where staff have been identified. For positions not yet filled, Career Team is committed to recruiting and hiring qualified candidates.

Career Team is committed to professional staff development across all positions. By the third quarter of program operation, a minimum of 50% of staff will hold or be actively pursuing CDF or CWDP certification. Staff also participate in structured onboarding and ongoing training to ensure consistency in service delivery, compliance with WIOA requirements, and alignment with program goals.

Right of First Refusal will be honored for all case management and eligibility staff during contract negotiations as required by the MWDB.

Facilities- It is expected that the program(s) operate within the SC Works Centers in the Midlands area. At this time there are three - one located in each of the service counties. Describe what activities will be provided in the Center(s) and if satellite sites will be necessary.

Career Team will deliver all WIOA-funded services through the three SC Works Centers located in Fairfield, Lexington, and Richland Counties, operating within the established SC Works Midlands system. Career Team views the SC Works Centers as the hub of service delivery and is fully committed to maintaining a consistent, visible, and accessible presence at all three locations. All core program activities will be provided within the centers, including:

Adult and Dislocated Worker Services

- Outreach, intake, orientation, and eligibility determination
- Initial and comprehensive assessment of skills, aptitudes, and barriers
- Individual Employment Plan development and career planning
- Job search and placement assistance
- Labor market information and career pathway guidance
- Referrals to training, partner programs, and supportive services
- Occupational skills training coordination and Individual Training Account management
- Work based learning coordination including OJT, work experience, and internships
- Financial literacy services
- Unemployment insurance information and assistance
- Financial aid information and assistance
- Follow up services for a minimum of 12 months after exit

Youth Services

- Recruitment, intake, eligibility determination, and orientation
- Objective assessment and Individual Service Strategy development
- Case management and mentoring
- Tutoring, study skills, and dropout prevention activities
- Occupational skills training and credential attainment
- Work based learning including work experience, internships, pre apprenticeships, and OJT
- Leadership development and community service activities
- Financial literacy and entrepreneurial skills training
- Career awareness, counseling, and exploration
- Postsecondary education preparation
- Follow up services for a minimum of 12 months after exit

Business Services

- Employer outreach and engagement
- Job order development and candidate referrals
- Work based learning worksite development
- Hiring events and job fairs
- Labor market data and sector information
- Rapid Response coordination

One Stop Operator Functions

- Center operations management and partner coordination
- Staff development and training
- ADA and EO compliance oversight
- Customer flow and satisfaction monitoring
- Partner meeting facilitation

The Richland and Lexington Centers will serve as the primary sites for full time staffed service delivery, with the Fairfield affiliate center receiving regular staff presence to ensure customers in that county have meaningful and consistent access to services without having to travel outside their community.

Career Team recognizes that participants across a three county region, particularly those in rural Fairfield County, may face transportation barriers, limited broadband access, or other challenges that make regular center visits difficult. To address this, Career Team will supplement center based delivery with community access points at trusted partner locations and leverage Career Edge, our integrated workforce platform, to provide 24/7 mobile first access to intake, career readiness content, case management communication, and job search tools, reducing the impact of distance and transportation barriers between in person appointments.

Career Team does not anticipate the need for dedicated satellite office space beyond the three existing SC Works Centers. All required activities can be delivered effectively through the center locations combined with strategic community outreach and virtual service options. Where barriers such as transportation, work schedules, or geography prevent consistent center access, Career Team is prepared to establish a presence at community partner locations such as public libraries, faith based organizations, community centers, or other trusted sites to meet participants where they are and reduce obstacles to engagement. This flexible community embedded approach ensures no eligible participant is left without access to services due to circumstances beyond their control. Should additional access needs be identified during program implementation, Career Team will work collaboratively with the MWDB to expand the service footprint in a way that best serves Midlands area residents.

Partnerships - Describe any partnerships that will be used in the project. Who is involved? What are the roles and responsibilities of each partner? Include letters of support from the partners and any MOAs already in place. Describe how you will coordinate services and collaborate with the WIOA required partners and other added partners as appropriate.

Career Team's approach to partnership is grounded in a simple but proven philosophy: strong workforce outcomes are built through strong community relationships, and those relationships are built through showing up, staying present, and delivering results. In every community Career Team has entered, building a deep and functional partner network has been among our first and most important priorities, and our track record demonstrates that we do it well and quickly. Career Team will collaborate with Able South Carolina to strengthen workforce services across the Midlands region by coordinating referrals, sharing resources, and aligning supportive services for participants. The partnership will focus on connecting individuals to appropriate programs, leveraging Able SC's community and employer relationships, and ensuring participants, particularly those with disabilities, have access to inclusive employment opportunities. Together, the organizations will support employers through talent connections and work jointly to enhance overall workforce outcomes through ongoing communication and coordinated service delivery. We submit three examples of other partnerships to demonstrate our success:

- In South Central Kentucky, Career Team inherited a service area with 7 community access points. Through a deliberate strategy of co-locating Career Advisors within libraries, youth-serving organizations, housing providers, and other trusted community settings, Career Team expanded that network to more than 25 access points across a 10-county region. That expansion was not administrative. It was a direct investment in reaching participants who would never have walked into a workforce center on their own, and it produced a service network whose reach and depth directly supported strong program outcomes year over year.
- In Orange County, California, where Career Team currently serves as the WIOA Adult and Dislocated Worker provider, we maintain active co-location partnerships at more than five community sites spanning emergency shelters, transitional housing providers, and reentry organizations, participate in more than 20 monthly mobile outreach events, and keep a dedicated Career Advisor on-site at a Joint Forces Training Base three days per week to serve veterans and their families. When this contract came up for rebid, over 20 partners across the community submitted letters of support committing to continued collaboration, a direct reflection of relationships built through consistent presence and demonstrated results.
- In Pierce County, Washington, Career Team identified existing community organizations that already had trusted relationships with young adults and built a coordinated service model around them rather than alongside them. Career Team established co-location presence at four community sites including youth-centered drop-in settings and a regional mall, partnered with a local nonprofit to create a direct pipeline into a pre-apprenticeship program with a 95 percent completion rate, and designed a service model that met young adults in the places they already felt comfortable. The result was a program that served nearly 500 young adults through WIOA Young Adult services. That outcome was not produced by Career Team operating independently. It was produced by Career Team investing in the community's existing assets and building a coordinated network around them.

Career Team will immediately pursue Memoranda of Agreement with all required WIOA core partners and key community partners consistent with WIOA requirements and MWDB guidance.

Wagner-Peyser Employment Services (SC Department of Employment and Workforce)

Wagner-Peyser staff co-located within the SC Works Centers are among Career Team's most important day-to-day partners. Career Team has a documented history of operating effectively alongside Wagner-Peyser staff across multiple integrated center environments. In Lincoln Trail, external monitoring confirmed coordinated customer flow, just-in-time referral handoffs both in person and online, shared labor market information, front-line intake support across all affiliate sites, and active collaboration on business services and hiring events. In Workforce Central, monitoring documented a center structure in which WIOA staff, Wagner-Peyser staff, RESEA staff, business services staff, and partner staff all functioned within the same system, with customers directed to appropriate staff based on service need. In the Midlands area, Career Team will replicate this integrated approach, aligning intake processes, coordinating customer flow protocols with Wagner-Peyser, collaborating on labor market information sharing, and co-participating in employer outreach and hiring events.

Adult Education and Literacy (SC Technical College System / Midlands Technical College)

Career Team's experience with Adult Education partnerships goes beyond simple referrals. In Lincoln Trail, Career Team partnered with Adult Education on National Literacy Week events and GED graduation ceremonies, consulted on TABE best practices and procedures, and convened joint sessions with Elizabethtown Community and Technical College specifically to strengthen reverse referral pipelines. In North Central Texas, Career Team built deep relationships with community college partners to align training offerings, co-enroll participants in short-cycle credential programs, and develop joint outreach strategies for basic skills-deficient populations. In the Midlands area, Career Team will coordinate with Midlands Technical College, Central Carolina Technical College, Orangeburg-Calhoun Technical College, and Adult Education providers on co-enrollment, referral pathways, shared outreach, TABE consultation, and integrated education and training programming for participants who are basic skills deficient or English language learners. Career Team views Adult Education not as a separate program but as a critical bridge for many WIOA customers who need foundational skills support before or concurrent with occupational training.

Vocational Rehabilitation (SC Vocational Rehabilitation Department)

Career Team brings a strong and documented track record of coordinating with Vocational Rehabilitation to serve individuals with disabilities, particularly youth, across multiple workforce systems. That experience is grounded in a service philosophy that prioritizes accessibility, individualized support, and inclusive practices, and it is reflected not just in operational practice but in formal recognition from VR partners themselves.

Career Team has coordinated with VR partners across several of its programs. In a prior workforce system in Kentucky, Career Team worked closely with the state's Office of Vocational Rehabilitation on intensive client referrals and work experience connections for out-of-school youth with disabilities. Monitoring documentation from a workforce system in the Pacific Northwest recognized Career Team's strong coordination with VR on co-enrolled participants and its ability to develop non-duplicative service strategies that addressed both VR and WIOA goals simultaneously. In Delaware, Career Team operated statewide WIOA Youth services alongside VR partners to serve youth with disabilities through individualized service strategies and work-based learning placements.

That history of collaboration was formally recognized when Career Team received a VR Partnership Award from its state VR partner, an honor the awarding agency described as recognizing achievement through collaboration, special projects, or innovative efforts that serve VR customers while finding ways to work smarter. The award was presented in recognition of Career Team's work on a Summer Earn and Learn program serving students with disabilities between the ages of 14 and 22. Career Team provided work readiness training, developed employer worksites, and oversaw participants through a five-week work experience assignment. Career Team's specific innovation was packaging Career Edge content into a dedicated program course that allowed participants to complete their work readiness requirement remotely for the first time in the program's history, expanding access and enabling verifiable completion and appropriate billing for VR customers.



In the Midlands, Career Team will coordinate with the SC Vocational Rehabilitation Department on co-referrals, shared case management for mutual customers, and work-based learning development for individuals with disabilities across all three target populations. That coordination will be particularly intentional for youth with disabilities, who benefit most from the kind of individualized, partner-connected service model that Career Team is specifically designed to deliver.

SC Department of Social Services (DSS)

Career Team has extensive experience operating alongside TANF, SNAP E&T, and related human services programs across its national portfolio, including current TANF Choices, SNAP E&T, and Noncustodial Parent program operations in multiple states. In North Central Texas, Career Team managed a significant increase in walk-in traffic from individuals navigating SNAP-related issues, developing real-time response protocols that resolved cases same-day or within 24 hours while protecting scheduled WIOA appointments. In Pierce County, Washington, we co-located staff at DSHS office and integrated into the office's workflow to ensure we maximized co-enrollment opportunities. We also have stationed Career Advisors in lobbies of Social Services office to reach potential WIOA customers. This operational experience in navigating overlapping human services programs translates directly to effective coordination with DSS in the Midlands area. Career Team will maintain active referral relationships with DSS to connect WIOA participants to TANF, childcare assistance, food assistance, and other wraparound services, and will work collaboratively with DSS staff to identify co-enrollment opportunities and avoid duplication of services for shared customers.

Community Colleges and Approved Training Providers (Midlands Technical College, Central Carolina Technical College, SC Eligible Training Provider List)

Training provider partnerships are among the most operationally significant partnerships Career Team maintains. In Orange County, Career Team maintains active working relationships with multiple community colleges and approved training providers across healthcare, IT, skilled trades, and professional development, coordinating on ITA referrals, tracking participant progress through completion, and maintaining regular check-ins with providers to identify

attendance concerns and intervene early. In South Central Kentucky, Career Team partnered with area technical and community colleges to co-develop a Heavy Equipment Sciences program that created a direct pipeline from training into regional construction and trades employment, demonstrating Career Team's capacity to go beyond referral coordination and actively shape training offerings around employer demand. In North Central Texas, partnerships with regional community colleges produced structured co-enrollment and reverse referral models that increased credential attainment rates by creating two-way pipelines between workforce services and postsecondary education. In the Midlands area, Career Team will build active working relationships with Midlands Technical College, Central Carolina Technical College, Orangeburg-Calhoun Technical College, and all providers on the SC Eligible Training Provider List, collaborating on Individual Training Account referrals, career pathway alignment, co-enrollment, reverse referral pipelines, credential attainment tracking, and joint outreach to employers in priority sectors. Career Team will convene regular meetings with training partners to review participant progress, identify capacity gaps, and ensure training investments are responsive to real regional hiring demand.

Juvenile Justice, Reentry, and Recovery Partners

Career Team has a deep and demonstrated history of reaching individuals involved in the justice system and those in recovery, and has developed some of the most innovative reentry service models in its national portfolio. In Kentucky, Career Team launched the state's first prison-based Career Center satellite site, delivering comprehensive career services to recently released individuals through the Linking Employment Activities Pre-release program. LEAP participants complete soft skills development and occupational training before transitioning directly into paid work experience with local employers, creating a structured bridge from incarceration to employment that most workforce programs never attempt to build. In Tennessee, Career Team implemented a tablets in jails program that brings Career Edge directly into correctional facilities, allowing incarcerated individuals to build work readiness skills before release. Career Team also developed a unique partnership with a county jail and the local Sheriff's Department to operate a work-release program specifically designed to address recidivism, in which participants engage in paid work experience during the day with transportation coordinated and provided by the Sheriff's Department. Career Team leadership also brings direct experience developing strategic recruitment and retention plans that increased enrollment among reentry and recovery populations by approximately 45 percent. In the Midlands area, Career Team will establish relationships with the SC Department of Corrections, local detention facilities, reentry organizations, drug court programs, and substance abuse treatment providers to ensure justice-involved youth and adults are connected to WIOA services, work-based learning, and career pathway opportunities from the earliest possible point in their reentry process.

Veterans Service Organizations and Military-Connected Partners

Career Team has particular experience and commitment in serving veterans and military-connected individuals. In Lincoln Trail, Career Team established the first-ever staffed access point at Fort Knox in December 2023, specifically to increase service delivery to transitioning service members and military families. Career Team partnered with military transition programs on Transition Assistance Program Employer Days, job fairs, and career workshops for veterans, transitioning service members, and military spouses. In the Midlands area, which is home to a significant veteran and military-connected population, Career Team will engage Veterans Service Organizations, the SC Department of Veterans Affairs, American Legion posts, VFW chapters, and other veterans-focused organizations to ensure veterans and eligible spouses receive the priority of service they are entitled to and the specialized connections needed to translate military experience into civilian career pathways.

Employers, Chambers of Commerce, and Industry Organizations

Career Team engages employers as partners in the workforce system, not simply as end users. In North Central Texas, Career Team hosted Career Boost events connecting more than 80 job seekers with priority employers, resulting in 20 interview invitations and 12 hires from a single event. In Lincoln Trail, Career Team staff supported more than 20 hiring events and job fairs, collaborated with Chambers of Commerce on regional job fairs and manufacturing workforce events, and coordinated with elected officials, civic leaders, and economic development entities to build sector-level employer relationships. Career Team also leverages Career Boosts, virtual career fairs, sector-based employer roundtables, and OJT and work experience agreement development to deepen employer investment in the workforce system beyond transactional job posting. In the Midlands area, the Business Services Associate will build active employer relationships across Healthcare, Advanced Manufacturing, Information Technology, Construction and Skilled Trades, Logistics and Transportation, and other priority sectors, engaging Chambers of Commerce in Fairfield, Lexington, and Richland Counties, the Columbia Chamber, the Midlands Business Alliance, and individual employers as strategic partners in participant placement, training alignment, and work-based learning development.

Community Based Organizations, Faith Based Organizations, and Human Services Agencies

Career Team's community presence extends well beyond the workforce center walls, and this is not accidental — it is a deliberate strategy for reaching populations that do not walk through center doors on their own. In Lincoln Trail, Career Team hosted approximately 20 library-based workshops and pop-up service events across Hardin, Meade, LaRue, Marion, and Breckinridge Counties, collaborated with Goodwill, community coalitions, and social service agencies on more than 30 community resource events, and partnered with faith leaders and civic figures to reach disconnected youth. Career Team also partners with housing authorities, homeless service providers, foster care and transition-age youth programs, SNAP offices, and faith-based organizations as referral sources for out-of-school youth. In the Midlands area, Career Team will build a similarly diverse and deep community partner network spanning Columbia and the three counties, identifying the specific organizations that maintain trusted relationships with veterans, justice-involved individuals, individuals in recovery, individuals experiencing housing instability, people with disabilities, and other populations who need WIOA services most but are least likely to seek them out independently.

Coordination Approach

Career Team's coordination structure reflects the dual responsibility this contract carries. As the WIOA service provider, Career Team is accountable for delivering high quality, outcomes-driven services to Adults, Dislocated Workers, and Youth. As the One-Stop Operator, Career Team is simultaneously responsible for ensuring that all partners within the SC Works system function as a coordinated, seamless whole. These two roles require distinct leadership, and Career Team will staff them accordingly.

The Project Director will maintain consistent communication with the MWDB and all required program partners, oversee Career Advisor and Business Services Associate relationships with community and employer partners, and ensure that program-level coordination is structured, documented, and accountable. Career Advisors and the Business Services Associate will maintain daily working relationships with co-located and community partners, with cross-training conducted regularly so that partner staff understand Career Team's eligibility requirements and service offerings and Career Team staff understand what each partner can and cannot provide.

The One-Stop Operator will manage the partner coordination infrastructure across all three SC Works Centers,

convening required partner meetings, maintaining the Operations Manual for each Center, enforcing agreed-upon operational policies, and ensuring the full array of partner services is visible, accessible, and functioning consistently across Fairfield, Lexington, and Richland Counties. When coordination gaps arise, the OSO will surface them, convene the right partners, and drive resolution. This is an active management function, not an administrative one.

Career Edge strengthens both roles operationally by tracking referral status in real time, documenting partner interactions, and flagging incomplete referrals so that no customer falls between systems unnoticed. Career Team does not arrive in the Midlands expecting relationships to be handed to us. We will earn them through consistent presence, transparent communication, and a track record of following through on every commitment we make.

Description of the Bidder - What is the legal name of the organization, the legal status, and main purpose? How is the organization funded? Include an organizational chart showing lines of authority.

Legal Name

Career Team, LLC

Legal Status

Private, For-Profit Limited Liability Company

Career Team, LLC is a private, for-profit limited liability company incorporated in the state of Connecticut. Career Team was founded in 1996 and has operated continuously for nearly 30 years as a leading provider of public workforce development services across the United States.

Main Purpose

Career Team's mission is to empower one person, start one career, and serve one family at a time. The organization's core purpose is to connect individuals to meaningful careers while strengthening the talent pipelines that power local and regional economies. Career Team achieves this through customer centered workforce center operations, strong case management, employer responsiveness, and a disciplined commitment to performance accountability. Career Team stands at the edge of innovation in workforce development, leveraging people centered, technology driven approaches to expand access to opportunity for workers, youth, and employers across the nation.

Career Team's lines of business include operating One-Stop workforce centers; delivering WIOA Title I services for Adults, Dislocated Workers, and Youth; administering complementary employment and training programs such as TANF, SNAP E&T, Noncustodial Parent (NCP), and RESEA; providing employer and business services; and deploying proprietary workforce technology tools that improve customer engagement, service consistency, and performance outcomes.

How the Organization is Funded

Career Team operates at the intersection of workforce services and workforce technology. The organization's service delivery operations are funded through public contracts at the federal, state, and local level, spanning WIOA formula

programs, statewide workforce initiatives, and education-related contracts, with more than \$300 million managed across those funding streams and an active presence in multiple states and local workforce development areas. Career Edge, Career Team's proprietary workforce platform, represents a distinct and growing software side of the business, developed from Career Team's direct experience operating workforce programs and designed to strengthen service delivery, participant engagement, and system performance.

Organizational Leadership

Career Team is governed by appointed officers and a Board of Directors who provide oversight of all direct services contracts. The President of Workforce Services reports to the Chief Executive Officer and has overall accountability for career services operations nationally. The table summarizes the corporate personnel that will play a role in this project and the experience they bring. The President controls the management of the organization's Direct Services and reports to the CEO.

Key Corporate Personnel

Name & Title	Role	Credentials / Experience
Anthony Terlizzi, President	Oversees direct services portfolio including technology projects; sets and executes strategic direction for the company as well as areas of innovation; facilitates strategic partnerships at national and regional levels.	15 years of workforce development experience and management of complex projects; BA in finance
David Shufrin, Chief Compliance Officer/General Counsel	Provides consultation on compliance and contracting matters, updates all compliance related policies, and advises on legal issues as indicated.	15+ years as attorney representing private companies; JD with extensive experience in government contracting and corporate matters
Peggy Montalvo, Chief Financial Officer	Oversees the fiscal management and operations of the company including accounting policies and procedures, cost allocation plans, coordination of budgeting, reporting, and auditing activities, supervision of project accounting teams; and primary liaisons with the WDB fiscal team.	20+ years as a CFO and/or controller Experience in big five accounting firm BA, MBA with technology
Maxine Tolenoa, Vice President of Direct Services	Supervises and coaches/mentors Regional Directors and Project Directors; facilitates support between project teams and the corporate office; Interfaces with WDB regularly including reviews and attendance at Board meetings and provides enterprise-wide operational and strategic support.	15+ years of workforce development experience starting at front-line positions and working up to C-suite; Expertise in equity-based approaches; BA, MA with expertise in sociology and justice
Marci Dillion, VP of Human Resources	Facilitate recruitment, hiring, and retention and create a community and culture that adheres to Career Team values and personnel policies.	15+ years in human resources, BBA in Management, MBA in Human Resource Management, SHRM Senior Certified Professional

Robert Boone, Chief Officer of National Workforce Solutions	Facilitate sharing of best practices and participation in national communities of practices to support cross-site performance and innovation.	15+ years in education and workforce development including CEO of a WDB; BS psychology, MPA nonprofit management, EdD in education policy, measurement, and evaluation
Project Director, To be Hired	Responsible for leading the project team and overseeing day-to-day operations, including documentation and reporting; interacted with the corporate team for reporting and compliance.	BA / BS required with graduate degree preferred; At least five years of experience in a similar role

For the Midlands contract, Career Team's local project team will be supported by regional and corporate leadership through a clear and accountable organizational structure. The Project Director will serve as the primary local contact and will report to the Regional Director, who in turn reports to the Vice President of Workforce Services. This structure ensures that the Midlands project has direct access to senior leadership, corporate compliance and fiscal support, quality assurance oversight, and the full depth of Career Team's national organizational resources.

Organizational Chart

An organizational chart illustrating lines of authority for the Midlands project, including local staffing, regional oversight, and corporate support functions, is included as an attachment to this proposal.

Experience- Outline specific programs the organization has operated funding during the last three years that demonstrates experience in operating similar projects. Give program descriptions, funding sources, performance information and references. If the relevant experience has not occurred in the last three years, include the following; number of years for each population, coordinated activities with schools, faith-based and/or community organizations, and business/employers operating those programs and your role with those partnerships, Data demonstrating past experience and performance for each population in the proposal, Reporting documents used in past experiences, Success indicators for previous experience, Location where the service was provided. Describe the accessibility, security, program requirements.

Career Team has operated public workforce development programs continuously since 1996, managing more than \$300 million in public workforce contracts across multiple states and local workforce development systems. Career Team currently operates WIOA Title I programs in nine states, providing direct, current experience with the full scope of services required under this solicitation. The programs below reflect Career Team's experience during the last three years.

Programs Operated in the Last Three Years:

Lincoln Trail Workforce Development Board | Elizabethtown, Kentucky July 2022 – Present

Funding Source: Federal WIOA Title I Service Area: Eight-county region — Hardin, Meade, LaRue, Breckinridge, Marion, Washington, Grayson, and Nelson Counties Populations Served: Adults, Dislocated Workers, Out-of-School

Youth, In-School Youth Years Serving Each Population: 3 years

Career Team serves as the Direct Service Provider for Lincoln Trail, delivering the full array of WIOA Title I career services, training, work-based learning, case management, employer engagement, and follow-up across a comprehensive center in Elizabethtown and three affiliate sites in Bardstown, Lebanon, and Leitchfield, plus multiple community access points throughout the region. Services are provided in accessible, public-facing Kentucky Career Center locations with staffed reception, private meeting space, computer labs, and resource rooms. Career Team ensures ADA compliance and implements the LEP Plan at all locations.

Performance Highlights: Career Team exceeded all placement and retention goals in Lincoln Trail. The Kentucky PY23 Comprehensive Monitoring Review reported no WIOA program findings and no financial findings or observations. The review identified best practices in short and long-term goal setting for training participants, timely and detailed monthly case notes, and quality documentation practices. All prior monitoring issues were resolved with no repeat findings. Career Team also achieved a 25% increase in out-of-school Youth enrollments through data-driven outreach targeting high-poverty census tracts, established the first-ever staffed access point at Fort Knox to serve transitioning service members and military families, and served 2,238 career seekers through the Career Edge platform in a single program year.

Workforce Central | Tacoma, Washington July 2021 – June 2024

Funding Source: Federal WIOA Title I; Federal Economic Security for All (EcSA); QUEST National Dislocated Worker Grant Service Area: Pierce County, Washington Populations Served: Adults, Dislocated Workers, Out-of-School Youth, In-School Youth Years Serving Each Population: 3 years

Career Team delivered integrated workforce services through Workforce Central in an urban One-Stop environment, managing co-enrollment across multiple funding streams and coordinating with Wagner-Peyser, Adult Education, Vocational Rehabilitation, and community partners serving individuals with significant barriers including housing instability, justice involvement, and disability.

Performance Highlights:

Adults: 113% of annual enrollment target achieved; 95% timely service entry rate maintained; monitoring noted strong understanding of eligibility and enrollment requirements with all prior issues fully resolved.

Dislocated Workers: 103% of annual enrollment target achieved; 98% timely service entry rate across the full program year; all prior monitoring issues resolved with no additional issues identified in PY23.

Youth: 111% of annual enrollment target achieved; 94% of out-of-school youth services recorded within seven calendar days in PY22, rising to above 95% in PY23; monitoring documented strong partnership connections with community-based organizations serving housing-unstable youth.

The Washington Employment Security Department confirmed resolution of all prior monitoring findings with no new issues identified in PY23. Workforce Central monitoring documented Career Team's strong understanding of eligibility and enrollment requirements across all three funding streams.

Worknet Merced County | Merced, California Ongoing

Funding Source: Federal WIOA Title I Service Area: Merced County, California Populations Served: Adults, Dislocated Workers Years Serving Each Population: 3+ years

Performance Highlights % to goal (PY24): Entered Employment Rate Q2: 128% | Entered Employment Rate Q4: 115% | Median Earnings Q2: \$9,558.90 | Credential Attainment: 109% | Measurable Skills Gains: 102%

County of Ventura | Ventura, California Ongoing

Funding Source: Federal WIOA Title I Service Area: Ventura County, California Populations Served: Adults, Dislocated Workers Years Serving Each Population: 3+ years

Performance Highlights % to goal (PY24): Entered Employment Rate Q2: 101% | Entered Employment Rate Q4: 103% | Median Earnings Q2: \$9,894 | Credential Attainment: 97% | Measurable Skills Gains: 91%

Delaware Department of Labor | Statewide, Delaware Ongoing

Funding Source: Federal WIOA Title I Service Area : Statewide — Delaware Populations Served: Out-of-School Youth, In-School Youth Years Serving Each Population: 3+ years

Career Team operates statewide WIOA Youth services in Delaware, delivering individualized assessment, case management, work-based learning, occupational training, and all 14 required youth program elements across multiple service locations statewide.

Performance Highlights % to goal (PY24): Employment Rate Q2: 112% | Employment Rate Q4: 108% | Credential Attainment: 96% | Measurable Skills Gains: 92%

Upper Cumberland Workforce Development Board | Cookeville, Tennessee Ongoing

Funding Source: Federal WIOA Title I Service Area: Upper Cumberland region, Tennessee Populations Served: Adults, Dislocated Workers, Youth Years Serving Each Population: 3+ years

Youth Performance Highlights % to goal (PY24): Employment Rate Q2: 102% | Employment Rate Q4: 121% | Credential Attainment: 99% | Measurable Skills Gains: 104%

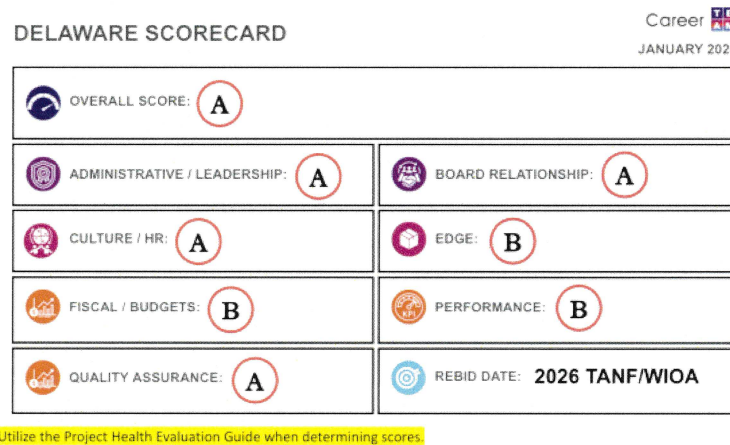
Reporting Documents Used in Past Experience

Across all contracts, Career Team has maintained consistent reporting practices aligned with federal, state, and local requirements. These include monthly payment invoices with complete supporting documentation submitted on the required schedule; Monthly Operations Reviews covering performance outcomes, expenditures, staffing, and compliance reviewed with Board staff and corporate leadership; weekly Direct Services Reports tracking enrollments, exits, participant engagement, credential attainment, and employment outcomes; participant case files maintained in state-mandated case management systems with all required eligibility documentation, service records, case notes, and outcome data; and formal monitoring response documentation when required, including corrective action plans tracked

through full resolution. All of these practices will be replicated in full for the Midlands WIOA contract using SCWOS and any additional reporting tools required by the MWDB. **References** are included as an attachment to this proposal.

Monthly Operations Review (MOR) Agenda

1. Financials
 - A. Participant
 - B. Operational
2. Performance
3. HR / Staffing
4. Career Edge
5. Board Relationship
6. Immediate Red Flags
7. Monthly Highlights
8. Report Card Recap



Administrative Capacity- Describe the process the organization uses to capture and report information on program participants. What monitoring and evaluation of program operations and staff are routinely carried out?

Career Team possesses extensive experience managing multiple federal, state, and local funding sources and conducting self-monitoring for performance and compliance. Career Team's policies and procedures align with federal (WIOA), state, and local requirements and adhere to generally accepted accounting principles (GAAP). Career Team maintains internal controls (policies and procedures) to ensure the continued reliability and integrity of the accounting systems. These fiscal controls translate to fully informed financial decisions by the company leaders, financial reports without errors, and the prevention of fraud. The seven internal control procedures include: a) separation of duties; b) access controls; c) physical audits; d) standardization of documentation; e) trial balances; f) reconciliations; and g) approval authority.

Career Team connects project teams to regional QA Associates who interface with the (corporate) Director of Quality Assurance. This approach creates accountability and connections to the full array of QA services available from the company. The QA Associate will support staff training, assist with data collection, conduct random record reviews, and ensure records retention and data security protocols are being followed. The QA Associate will also facilitate verification of documentation for direct participant spending (e.g., WEX, ITAs, support services). The Company manages almost \$12 million per year on these types of transactions. The QA Team and the Finance Team follow established protocols to document activities and connect them to the invoicing process.

Risk Management. Monthly checks are performed by the internal quality team to ensure adherence to guidelines, policies, and procedures. The monthly pool from which cases are pulled for internal monitoring by the QA Associate is created by the assigned staff members using state and Board data system reports. The sample pool is driven by a combination of risk assessment and randomization. For example, the pool designated to be pulled may include all persons enrolled in Occupational Skills training regardless of county, all new eligibility cases, or all cases assigned to a new staff person.)

Self-Evaluation Procedures. All Career Advisors are required to conduct Self-Audits of their cases utilizing Self-Audit tools developed for this purpose. For Career Advisors with over 15 cases, 33% of their cases must be self-audited each month. A portion of the Quality Team's internal audits includes a review of compliance with the Self-Audit policy.

Internal Monitoring Reports and Frequency. The QA Specialist is assigned audits the first week of each month that must be completed within the month. Designated tools are utilized for this purpose. Additional "special" audits may be launched during the month. Examples include Board requested specific reviews and reviews of cases before transfer between Career Advisors.

Compliance and Corrective Action Strategies. The Quality Assurance strategies outlined above are utilized to drive quality improvement and compliance. All review tools yield an expression of error rates that are tracked by a staff person. If error rates (either through internal or Board monitoring) merit Corrective Action, the general corrective progression is 1) additional training, 2) Performance Improvement Plan, and 3) Corrective Action. If compliance cannot or will not be achieved, Corrective Action can include termination.

Implementation Strategies. Quality implementation is "owned" by the entire team. Project Director and Career Advisor Lead develop program implementation strategies and assist in developing tools to assure compliance to the applicable policies and procedures. The Quality Assurance Team is responsible for internal monitoring to ensure the tools, procedures, and strategies are properly implemented. Leadership will arrange staff training and implement corrective action strategies as required for implementation. Frontline staff utilize the quality systems in place to ensure that assistance provided complies with related guidance.

Quality Control Plan. Career Team complies with all applicable federal, state, and local laws and guidelines. The Company maintains current written policies, procedures, and protocols to support the implementation of each contract. The corporate leaders take responsibility for all corporate-level policies and procedures. This team uses the information to ensure that project personnel (and partners) hold operational knowledge of policies, processes, and protocols most relevant to their positions. The Regional Director and Project Director coordinate regular communications processes and adjust professional development training activities to ensure project personnel and partners remain current. The table shows our compliance systems.

This table outlines Career Team's Quality Control Plan. The plan identifies key compliance systems, responsible staff, reporting mechanisms, and frequency of reporting.

Key Compliance System	Description	Responsible Staff	Reporting Mechanisms	
			To Management	To Board Staff
Workday	Financial Management	CFO, Accountant	Electronic Reports	Electronic reports
ADP	Payroll System	HR, Payroll Specialist	System reports	Invoice backup documentation
Microsoft Suite	Quality Assurance	QA Team, Leadership team	Daily shared spreadsheets	Electronic reports
Accounting Policies and Procedures	Financial Controls	CFO	Electronic reports	Electronic reports
Cost Allocation Plan	Shared costs methodology	CFO	Electronic reports	Electronic reports
Data Security Plan	Data security	Chief Compliance Officer	Electronic reports	Electronic reports
Operational Policies and Procedures	Alignment with federal, state and local policies	President, Regional Director	Electronic reports	Electronic reports
HR Policies / Employee Handbook	Personnel policies	Corp Dir of HR	Electronic reports	Electronic reports
Quality Assurance Plan	Process for onsite QA	Director of QA	Electronic Reports; oral reports	Electronic reports
Individual Professional Dev /Improvement Plans	Staff training & development; personal corrective action	HR, Executive Director, Regional Director	Electronic reports	Electronic reports
Grievance Process	Customer/staff grievance process	Chief Compliance Officer; President; HR	Electronic reports	Electronic reports
Invoicing	Monthly invoices to funding source	CFO	Electronic reports	Electronic reports

Fiscal Capacity- Describe the process used to capture and report fiscal information. What systems are in place to ensure fiscal accountability and appropriate expenditure of funds?

Career Team's fiscal infrastructure is built on nearly three decades of experience managing public workforce contracts and has supported more than \$300 million in federal, state, and local funding across a multi-state portfolio. The organization's financial policies and procedures align with WIOA requirements, applicable state and local rules, 2 CFR

200, and generally accepted accounting principles. Career Team has maintained a strong record of fiscal stewardship throughout its history, with no disallowed costs exceeding \$5,000 across its contract portfolio, reflecting the integrity and discipline embedded in its financial management practices.

At the corporate level, the Chief Financial Officer leads fiscal oversight and accountability for all contracts. The CFO oversees the production of integrated monthly financial statements by project, confirms that expenditures align to approved line item budgets, ensures invoicing is accurate and supported by proper documentation, coordinates audits and required tax filings, and maintains the organization's cost allocation plan. The General Counsel and Chief Compliance Officer provide additional oversight of financial compliance and contractual obligations. For the Midlands project, the Project Accountant will manage day-to-day fiscal operations under the direction of the Project Director and with direct access to corporate fiscal support, serving as the primary liaison with MWDB fiscal staff on invoicing, reporting, and financial compliance matters.

Career Team captures fiscal information through an enterprise-level financial management system, Workday, which integrates finance and human resources functions and provides automated workflows, audit trails, and role-based access controls that support timely and consistent financial processing across all contracts. Additional platforms including QuickBooks, ADP, and Google Workspace support invoicing, payroll processing, budgeting, and internal reporting.

Monthly invoices will be submitted to the MWDB each month with all required supporting documentation, consistent with contract requirements. Training vouchers, supportive service authorizations, and other direct participant expenditures will be entered into SCWOS in real time to track obligations and expenditures as required by South Carolina state policy. The annual financial closeout report will be submitted no later than August 15 each year.

Career Team's internal control structure is designed to ensure the reliability of financial reporting, prevent fraud and errors, and protect public funds at every level of operation. Core controls include separation of duties, defined approval authority, access controls, standardized documentation requirements, reconciliations, trial balance reviews, and periodic financial audits. Spending decisions that affect expenditures are governed by clear authorization processes including payroll approval, procurement approval, and participant cost approval. Personnel costs are supported through structured daily timekeeping practices in which staff record time against allowable activities for each funding source supporting their position. Supervisors review and approve all time records before payroll is processed, and coding aligns to the chart of accounts and project-specific cost centers to ensure accurate allocation to approved budgets and funding streams.

For participant-level expenditures such as Individual Training Accounts, work experience wages, on-the-job training reimbursements, supportive services, and incentives, Career Team requires that every cost be tied to the participant's approved employment plan, authorized before it is issued, fully documented in the case file, and verified by both fiscal and quality assurance staff before any payment is released. Supervisors review participant spending against program rules and the individual's service strategy, fiscal staff reconcile participant-level transactions to financial reports and invoicing, and quality assurance staff confirm that documentation supports each expenditure and that costs are allowable and correctly coded. High-risk items such as gift cards and gas cards are stored securely, issued only with supervisor approval, and logged with participant signature, value, reason, date, and approving staff member. Inventory is reconciled routinely so all items can be traced and accounted for.

Forecasting and expenditure tracking are embedded into routine operations. Each month, the Project Director,

Regional Director, CFO, and Project Accountant develop and review expenditure forecasts against the approved budget and expected service demand, monitoring burn rate, participant spend patterns, and vendor obligations. When trends indicate risk such as slower than expected enrollments, training start delays, or vendor capacity issues, leadership identifies root causes and implements corrective strategies including adjusting outreach and intake flow, accelerating training approvals, or strengthening work-based learning development activity. Career Team is committed to meeting the MWDB's expectation of expending not less than 80% of the total budget each program year, with 100% expenditure as the goal within two years, and manages this requirement as an active operational commitment rather than an end-of-year calculation.

Career Team maintains an established cost allocation methodology that is reviewed and updated at least annually or when contract changes require adjustment, Career Team's Cost Allocation Plan is available upon request. Direct costs are charged to the appropriate funding source whenever clearly attributable. Costs that benefit multiple programs are allocated using equitable bases appropriate to the cost type. Career Team complies with monitoring and reporting requirements. Our audit is available upon request. This structure supports consistent, compliant treatment of shared costs and strengthens audit readiness across all funding streams.

Subcontracts - Are there plans to subcontract for services and activities within the proposal? If so, describe the nature of the subcontracts, the subcontractor, the services to be provided by the subcontractor, and the planned cost.

Career Team does not propose any subcontracts under this solicitation. All services and activities described in this proposal will be performed directly by Career Team staff. Career Team has the organizational capacity, staffing infrastructure, and operational experience to deliver the full scope of WIOA Adult, Dislocated Worker, and Youth services, One-Stop Operator functions, and Business Services required under this RFP without reliance on subcontractors. Should any subcontracting become necessary during the contract period, Career Team will seek prior written approval from the MWDB in accordance with contract requirements before entering into any subcontract agreement.

Program Description - Describe the overall plan of service for any activity proposed. How will you recruit? What will be the customer flow? Which services will you coordinate with partner resources and which will you provide directly? Describe how the activities will be provided. How will you address Career Pathways and focus on the priority clusters? How will you increase the number of industry-recognized credentials within the clusters of training? How will you blend skills training with work-based learning? How will you address the focus on financial literacy services? Are you prepared to work with English language learners? How are you planning to provide One-Stop Operator Services?

Career Team's plan of service for the Midlands Workforce Development Area is built on a customer-centered, data-informed model that connects Adults, Dislocated Workers, and Youth to meaningful career pathways through integrated assessment, individualized planning, skills training, work-based learning, and employer engagement. Services will be delivered across all three SC Works Centers in Fairfield, Lexington, and Richland Counties, with community-based access points supplementing center operations where transportation or geographic barriers limit consistent attendance. All activities are designed to operate within a coordinated One-Stop system that eliminates duplication, maximizes partner resources, and ensures every customer experiences a seamless pathway from first contact through long-term employment retention.

Recruitment

Career Team uses a proactive, multi-channel outreach strategy to connect eligible individuals to WIOA services. Recruitment activities include participation in community events, job fairs, and career fairs; outreach through public libraries, community-based organizations, faith institutions, schools, and social service agencies; coordination with partner programs including DSS, Vocational Rehabilitation, Adult Education, and reentry organizations; targeted outreach to veterans through Veterans Service Organizations and military transition programs; social media and digital outreach through Career Edge; and direct referrals from SC Works partners and community stakeholders. For Youth, Career Team will conduct targeted community-based outreach using data-driven strategies such as qualifying census tracts to identify and connect with out-of-school youth who are disconnected from traditional systems, building on the approach that produced a 25% increase in OSY enrollments in a prior Kentucky workforce program. The Business Services Associate will simultaneously conduct employer outreach to develop work-based learning opportunities that serve as both recruitment incentives and pathway connections for participants. Conversion from initial contact to enrollment will be tracked and used to continuously refine outreach strategies throughout the program year.

Providing Individualized Career Services: If appropriate, aligned with local in-demand needs, and customer choice, staff will enroll customers for Individualized Career Services which includes the following steps:

1. Enrollment:

The average enrollment-to-intake process takes approximately 5 business days. We set a benchmark for project personnel to move jobseekers through the assessment and IEP process within 30 days and maintain at least bi-weekly touchpoints (weekly for special circumstances) that are documented in the case management system. We measure conversion rates in various ways, including the number of individuals who express interest (e.g., fill out enrollment form, attend an orientation or information session, watch an information session online) compared to those who are enrolled (adjusted for eligibility). We use an excellence-driven approach that places a premium on meeting or exceeding enrollment goals, which is the start of the talent pipeline. Qualifying and converting these interested individuals into enrolled participants means everyone benefits: Jobseekers build their skills and get jobs, employers enjoy a deeper, broader talent pool, and Midlands meets WIOA performance goals. Career Team dedicates itself to serving every customer, on our ability to enroll customers efficiently and effectively and “get to the yes” when serving customers while maintaining eligibility integrity and compliance

2. Comprehensive Assessments.

Career Team utilizes a variety of assessments to inform and engage the customer in the career planning process. Through motivational interviewing and intensive case management, CAs guide customers through the assessment process, ensuring that customer choice is always at the forefront and that the conversations are grounded in local labor market information, including in-demand and targeted industries. The process includes comprehensive assessments of the participant's life and current situation, academic, work aptitude/interests, and occupational skills. The CAs will approach assessments with a high level of diligence to uncover and identify unmet needs and barriers beyond literacy, numeracy, technology literacy, aptitude, and industry-relevant competencies.

3. IEP Development.

Assessments create the building blocks for IEP development. CAs will use motivational interviewing techniques to

engage customers in goal setting and the development of action items most relevant to building career pathways that address short-term and long-term perspectives. Inputs for these discussions will include skill, interest, and personality assessments, occupational and educational assessments conducted by other one-stop and/or community partners, and availability and access to other resources, including education and training providers, community supports, and other services (e.g., housing, behavioral health). The IEP serves as a road map that CAs and participants reference during regular touchpoints (at least twice monthly) and updates at least monthly, including any documentation (e.g., employment verification). The IEPs will reflect a sense of urgency to place individuals into employment and, where possible, identify immediate opportunities for job placement and “earn and learn” career pathways (e.g., apprenticeships, on-the-job training) for in-demand occupations or priority industry sectors.

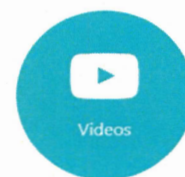
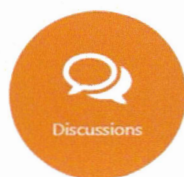
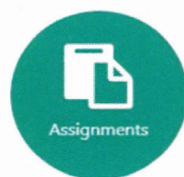
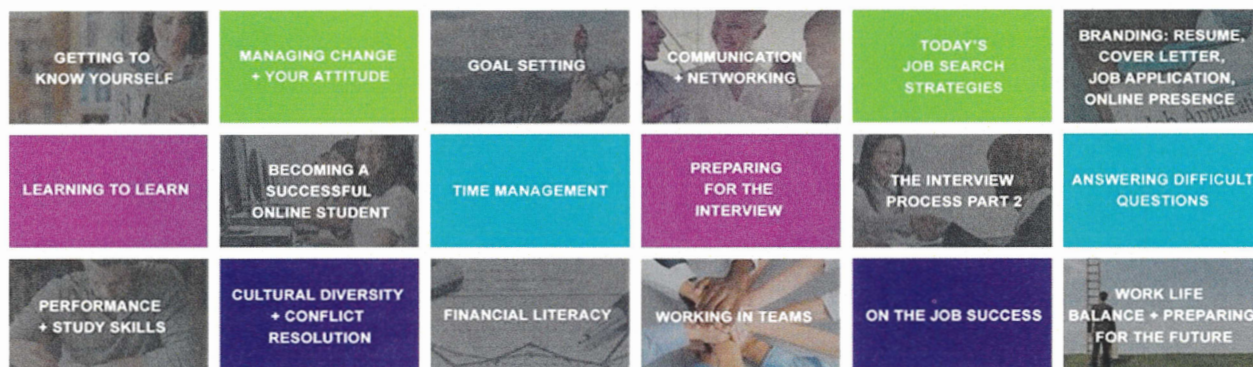
4. Career Readiness Services.

Career Advisors will assess Career Readiness during the IEP development process and provide a plan both in person and virtually, including our Career Edge technology. The Career Edge technology platform is fully virtual, mobile-friendly, and accessible 24 hours a day, seven days a week. This includes options for online enrollment, eligibility verification, orientation, virtual services, and on-demand and hybrid education and training options.

Career Team will inventory and review the existing workshop offerings and training priorities and gaps to identify gaps or areas of improvement. Career Team maintains an extensive library of workshops and formats (i.e., in-person, virtual, on-demand) to deliver content. We have experience offering workshops such as: a) Career Selfie that uses strength-based and preferred job requirements and skills lists to outline and create the "best job for me"; b) Social Media that explains the "how to" aspects of using social media; c) Job Search that instructs customers on the fundamentals of using the computer effectively for job search; d) Resume Prep for the 21st Century which incorporates the latest advances in resume writing; e) Interview Prep that reviews do's and don'ts and helps jobseekers reinforce their unique value propositions; f) Google 1 that explores, practices and uses entry level Google applications; g) Google 2 that explores, practices and uses intermediate level Google applications; and h) Computer Basics that offers entry level training on the fundamentals of using a computer. We can convert existing workshop content into hybrid and/or on-demand formats, develop custom content, or use content from Career Edge as the basis for workshops. This image shows a sample of Career Edge offerings.

LIFE SKILLS + STUDENT SUCCESS

PROFESSIONAL DEVELOPMENT



5. Individual Training Accounts

Based on the assessments, local labor market information, and the IEP, it may be determined that additional training is needed. Participants will create individual Career Edge user accounts to help solidify the plan and ensure that it aligns with their interest in accessing career development and career readiness content and tools. Project staff will curate content to support the attainment of High School Diplomas or equivalents as well as other important skills (e.g., financial literacy and time management).

Occupational Training: All participants interested in training will review local and national labor market information, review current job openings available to them upon completion of the training, review industry exploration modules available on Career Edge, and conduct research on eligible training providers (including completion rates and job rates) to facilitate informed decisions based on customer choice.

Career Advisors are the main point of contact for the participant and will maintain regular contact with the participant in the training, including key-date check-ins: within the first 3-days, mid-point, two weeks prior to completion, and within 3 days of completion. Additional or different touchpoints can be established with the participant based on participant choice, duration of training, etc.

Work-Based Learning (WEX/OJT). Career Team will assist in the development of the full continuum of work-based learning (e.g., internships, work experience, pre-apprenticeship, OJT) and job opportunities relevant to the priority populations, in response to market conditions, and in alignment with strategic education, workforce development, and economic development initiatives. Career Team has developed jobs across all industry sectors relevant to the Board's priorities. We prepare participants for work experiences through a variety of career development activities including Life Skills and Career Success content, activities, and resources available on Career Edge as well as through other training and workshops. We also can develop and deliver customized, short-cycle bootcamps and training activities to build and refresh soft skills and prepare participants to transition successfully into a work-based experience. Career Advisors and participants will identify potential work-based learning opportunities and determine the best fit based on

circumstances most relevant to the IEP and available resources. The Career Advisors conduct bi-weekly touchpoints and will use these to review progress and document any gains (e.g., skills, credentials) as well as identify next steps for advancement along their IEPs and career pathway journey.

Examples include:

Individual Training Account Management.

Career Team works closely with each funding source to develop standardized documents for financial transactions (e.g., personnel time records, invoices, travel expense reports, ITA use, participant supports). Using standard document formats increases compliance with funding source requirements, reduces the probability of disallowed costs, and expedites the review of review past records when searching for the source of a discrepancy in the system. The Vice President, CFO, Regional Directors, and project site executive director work collaboratively with the funding source to map out the financial reporting and monitoring process; update policies, protocols, and procedures specific to the funding source (e.g., ITA or participant support spending limits; authorization); adjust company processes to facilitate documentation (e.g., Chart of Accounts); and facilitate regular communication and review of reports, invoices, monitoring, and audits. As needed, we are well-equipped to implement and manage fiscal and administrative tracking based on local requirements and preferences. During the transition process, Career Team will work with the Midlands liaison to establish fiscal and administrative protocols.

We will use proven models in operation at other direct service delivery sites to document the interest, eligibility, enrollment into qualified programs, progress, and completion of activities associated with ITA activities. Career Team customizes these forms based on the policies, procedures, and operational responsibilities relevant to each funding source. For example, this process looks quite different in sites where the funding source processes the fiscal transaction for the ITA and pays the approved training provider directly.

6. Job Placement

Career Team is committed to ensuring employment placement and self-sufficient wages for Adult, Dislocated Worker, and Youth participants engaged in WIOA Title I services through a holistic and personalized approach. Our strategy begins with a personalized approach to career pathway development, recognizing the unique journey of each customer via assessments and the specific needs of local areas through local labor market information. The proposed services model represents a demand-driven approach that will support the advancement of the industry sector/cluster and occupational (in-demand) priorities identified by Midlands. CAs leverage tools like self-sufficiency calculators, living wage calculators, and benefits cliff dashboards, aiding participants in understanding their unique needs and local career opportunities to determine a career path that makes the most sense for them.

Our Career Advisors collaborate closely with participants to craft tailored pathway plans, integrating Career Edge tools for industry exploration and labor market research. Career Advisors guide customers in understanding the elements of a quality job, including self-sufficient wages tailored to their unique circumstances. Through collaborative exploration of local labor market information, our Career Advisors assist customers in identifying careers that align with their individual interests, ensuring informed decision-making and customer choice.

Through our experience, we know the importance of highlighting local in-demand opportunities in lesser-known and non-traditional careers that offer high wages. We recognize that representation (e.g., Women in Construction) or

elevating lesser-known industries with high opportunities and high growth potential (Water Management) is crucial to workforce and economic development. **Career Boost** workshops assemble training providers, employers, and jobseekers into the room to explore labor market information, career pathways, and job openings. Career Boost represents a vehicle to enhance the labor exchange functions and produce significant interest, traffic, leads, and engagement. We use Career Boosts in person and virtual around the country to successfully meet enrollment and spending goals while increasing awareness of local, in-demand and high priority industries.

7. Follow-up

Career Team's follow-up strategies for Adult/DW/Youth participants are designed to enhance job retention and foster career path growth through comprehensive and personalized support. Our strategy begins with the end in mind; in other words, CAs develop IEPs plans that incorporate follow-up activities with each customer. CAs ensure participants know that they can reach out for assistance at any time such as needing support adjusting to a new position and if they become unemployed. CAs provide up to 12 months of follow-up services to participants in unsubsidized employment, focusing on job retention and career advancement. Typically, we conduct monthly contacts to track and support our customers in follow-up using various methods of communication (phone, email, and texting). Through these regular check-ins, we assess participants' status and offer various support depending on need: For employed individuals, we enter employment outcomes per policy and provide professional development support such as conflict resolution, working in teams, and wage negotiation and advocacy. For those individuals who are unemployed, we offer job search services and invite them to participate in job fairs in their area and share free resources they can use to sharpen their skills. All participants receive ongoing referrals to community and governmental resources as needed. Participants will be encouraged to continue accessing content and resources available through Career Edge, virtual resources and tools, and other supports (e.g., peer support groups, networking events, workshops) and CAs will engage with VIPs as needed to ensure Youth continue in a successful path.

Services Provided Directly vs. Coordinated with Partners

Career Team will provide directly all core WIOA career services, including intake and eligibility determination, orientation, assessment, IEP and ISS development, career counseling and planning, job search and placement assistance, labor market information, workshop facilitation, work-based learning coordination, supportive service navigation, follow-up services, and case management for all three populations. Business services and employer engagement will be led directly by the Business Services Associate.



Career Team will coordinate with and refer to partners for services outside the core WIOA scope, including unemployment insurance assistance and labor exchange services through Wagner-Peyser; basic skills instruction and GED preparation through Adult Education; specialized services for individuals with disabilities through Vocational Rehabilitation; TANF and childcare assistance through DSS; housing, transportation, and basic needs supports through community-based organizations; and occupational training delivered by eligible providers on the SC Eligible Training Provider List. All referrals will be documented in SCWOS, tracked through Career Edge's Referral Tracker, and followed up on to ensure service continuity and prevent customers from falling through the cracks between programs.

How Activities Will Be Provided

Career services will be delivered through three primary channels: individual case management appointments, in which Career Advisors conduct regular one-on-one sessions with each participant to review progress, update plans, address barriers, and coordinate next steps; group workshops facilitated by the Facilitator covering job readiness, soft skills, interview preparation, resume development, financial literacy, digital literacy, career exploration, and labor market information, with content tailored to specific populations and aligned to employer expectations in priority sectors; and on-demand access through Career Edge, which gives participants 24/7 mobile-first access to career readiness content, assessments, the AI Career Coach, the AI Resume Builder, the Interview Simulation Trainer, job search tools, document upload, appointment scheduling, and secure messaging with their Career Advisor.

Career Team maintains an extensive workshop library and can deliver content in person, virtually, or in hybrid and on-demand formats. Workshop offerings include career exploration and strengths-based planning, social media and digital job search skills, resume preparation aligned to current employer expectations, interview preparation and value proposition development, and foundational and intermediate computer and Google application skills. Career Team can convert existing workshop content into hybrid or on-demand formats, develop custom content for the Midlands area,

or use Career Edge's built-in content library as the foundation for workshops and facilitated sessions.

Career Pathways and Priority Clusters

Career Team will align all service activities to the career pathways and priority industry clusters identified by the MWDB, including Healthcare, Advanced Manufacturing, Information Technology, Construction and Skilled Trades, Logistics and Transportation, and Hospitality. Labor market information will be used as a routine operational tool at every level of service delivery. Career Advisors will incorporate Lightcast and state labor market data into Individual Employment Plans to ensure training choices, career goals, and work-based learning placements are grounded in real regional hiring demand and realistic wage and advancement potential.

The Business Services Associate will conduct ongoing employer outreach within priority sectors, building direct knowledge of hiring needs, required credentials, skill gaps, and advancement pathways that will inform how Career Advisors guide participants toward sustainable employment. Regular Match Meetings between Career Advisors and the Business Services Associate will align the candidate pipeline to active job orders and sector opportunities. Career Team also conducts Career Boost events that bring together training providers, employers, and job seekers to explore labor market information, career pathways, and current job openings in priority industries, including lesser-known sectors with high wages and strong growth potential where awareness is critical to connecting participants to opportunity.

Increasing Industry-Recognized Credentials

Credential attainment is a core performance outcome and an operational priority throughout the program year. Career Team will increase the number of industry-recognized credentials by connecting participants to occupational training programs on the SC Eligible Training Provider List that lead to recognized credentials in priority sectors, prioritizing short-cycle, stackable credentials that allow participants to enter employment quickly while continuing to advance. Participants considering training will review local and national labor market information, current job openings available upon training completion, Career Edge industry exploration modules, and eligible training provider data including completion and employment rates, ensuring informed decisions grounded in customer choice and labor market reality. Career Advisors will use IEPs to set clear credential milestones and will monitor training progress through structured check-ins at enrollment, midpoint, two weeks prior to completion, and within three days of completion, adjusting support when participants fall behind. Individual Training Accounts will support participants in approved training programs, and Career Team will work with training providers and community college partners to identify opportunities for co-enrollment, reverse referrals, and combined education and workforce programming that increase credential completion rates within priority clusters. The Program Manager will monitor credential attainment trends through weekly Direct Services Reports and the Monthly Operations Review, implementing targeted re-engagement strategies when attainment is trending below target.

Blending Skills Training with Work-Based Learning

Career Team views work-based learning as an integrated component of each participant's career pathway. Career Team will develop and maintain a robust continuum of work-based learning opportunities including On-the-Job Training, Work Experience, internships, pre-apprenticeships, apprenticeships, transitional jobs, and summer youth employment, coordinated by the Business Services Associate in close collaboration with Career Advisors. Participants are prepared for work-based learning through career readiness activities, soft skills workshops, and short-cycle boot

camps as needed prior to placement. Career Advisors and the Business Services Associate jointly identify placement opportunities that align with each participant's IEP goals, career pathway, and employer demand in priority sectors. Once placed, Career Advisors maintain structured bi-weekly check-ins to monitor progress, document skill gains, and support successful transition into unsubsidized employment. For Youth, Career Team will ensure that at least 30% of youth funds are spent on work-based learning activities consistent with WIOA requirements, with paid opportunities prioritized wherever allowable to increase engagement and reduce financial barriers for low-income youth. Career Team has the organizational capacity to serve as Employer of Record for work experience placements, supported by its national Work Experience Coordinator, ensuring compliant and consistent administration of paid placements across all three counties.

Financial Literacy Services

Financial literacy is integrated throughout Career Team's service model as both a standalone program element and an embedded component of case management. The Facilitator delivers structured financial literacy workshops covering budgeting, debt management, banking and savings, understanding paystubs and taxes, and building credit, offered in group format at SC Works Centers and supplemented through Career Edge's financial literacy and budgeting modules available on demand. Career Advisors incorporate financial literacy into individual planning conversations, particularly for participants who identify financial instability as a barrier to employment or training, using self-sufficiency calculators, living wage calculators, and benefits cliff tools to help participants understand the wage and career pathway choices that will move them toward genuine economic independence. For Youth, financial literacy is incorporated into the Individual Service Strategy and delivered through direct instruction and partner connections to financial education resources in the community. Career Team will coordinate with local banks, credit unions, and community organizations to provide access to financial advisors and subject matter experts for workshops and community conversations throughout the program year.

English Language Learners

Career Team is prepared to serve English language learners across all three target populations. Career Team actively recruits and retains bilingual and multilingual staff, with this capacity prioritized in local hiring decisions in areas with significant LEP populations. Where bilingual staff are not available, Career Team utilizes language line interpretation services and written translation of key materials to ensure participants with limited English proficiency have full and equitable access to all services. The One-Stop Operator will maintain the Midlands Limited English Proficiency Plan and ensure ADA-compliant materials and equipment are available in all centers. Career Advisors are trained to approach LEP customers with cultural humility and a strengths-based mindset and to coordinate closely with Adult Education partners for concurrent English language acquisition and integrated education and training programming. Career Edge supports multiple language formats to extend digital access to participants regardless of English proficiency, and workshops and orientations will be adapted in content and delivery to be accessible and relevant for English language learners throughout the Midlands area.

One-Stop Operator Services

Career Team will fulfill the One-Stop Operator function as the managing partner of the SC Works Midlands system, coordinating service delivery across all three center locations. Core Operator responsibilities include enforcing center operational policies including hours of operation, data confidentiality, health and safety, and service delivery standards; coordinating with co-located partners to ensure all common areas are appropriately staffed; convening regular partner

meetings at minimum quarterly to align service delivery, resolve operational issues, and strengthen collaboration; maintaining and updating the Operations Manual for each center; implementing staff development plans including technical training on SCWOS and information sharing across the partner network; ensuring all centers and services are ADA and Equal Opportunity compliant; maintaining the Midlands LEP Plan; monitoring customer satisfaction and addressing complaints promptly; and providing regular activity reports to MWDB staff as requested.

Where Career Team serves as both the direct service provider and the One-Stop Operator, clear organizational firewalls will be maintained to prevent conflicts of interest, including distinct separation of duties and responsibilities between the Operator and direct service functions. The One-Stop Operator will work continuously to ensure the Midlands SC Works system operates as one integrated, customer-centered workforce system rather than as a collection of separate programs, and will pursue and maintain One-Stop Certification Standards throughout the contract period in coordination with the MWDB.

Career Team has offered a budget on the following pages that is firm for a period of at least 90 days from submission.

**Midlands Workforce Development Area
Budget Summary**

Bidder: Career Team LLC Solicitation #: _____

Activity Designation: Midland's WIOA Budget

	<u>Adult</u>	<u>Dislocated Worker</u>	<u>Youth</u>	<u>Total</u>
I. Administration:				
1. Salaries & Fringe Benefits	_____	_____	_____	_____
2. Non-Instructional Equipment	_____	_____	_____	_____
3. Operating Expenses	_____	_____	_____	_____
4. Indirect Costs	_____	_____	_____	_____
5. Sub-Total	_____	_____	_____	_____
II. Non-Administration:				
1. Salaries & Fringe Benefits	423,930	423,930	430,812	1,278,672
2. Indirect Costs	47,460	47,460	48,301	143,220
3. Operating Expenses	\$50,666	\$50,666	\$52,201	153,532
4. Work-Based Learning Activities	\$36,000	\$9,000	\$350,000	395,000
5. Instructional Training	\$277,500	\$277,500	\$0	555,000
6. Supportive Services	\$70,000	\$65,000	\$50,000	185,000
7. Assessment	\$0	\$0	\$0	-
8. Incentives	_____	_____	\$0	-
9. Other - Profit	\$37,966	\$37,966	\$38,644	114,576
10. Sub-Total	\$943,521	\$911,521	\$969,958	2,825,000
III. TOTAL GRANT COST (I+II)	<u>\$943,521</u>	<u>\$911,521</u>	<u>\$969,958</u>	<u>2,825,000</u>

**Midlands Workforce Development Area
Budget Summary**

Bidder: Career Team LLC
Solicitation #: _____

1. Staff Salaries:					Adult		Dislocated Worker		Youth	
	Salary Per Mo.	% of Time	# of Months	TOTAL AMOUNT	%	Federal Amount	%	Federal Amount	%	Amount
Executive Director	7,083	100%	12	85,000	0.33	28,050	0.33	28,050	0.34	28,900
One Stop Operator	5,833	100%	12	70,000	0.33	23,100	0.33	23,100	0.34	23,800
Program Manager	5,417	100%	12	65,000	0.33	21,450	0.33	21,450	0.34	22,100
Business Services Associate	4,167	200%	12	100,000	0.33	33,000	0.33	33,000	0.34	34,000
Faciliator	4,000	100%	12	48,000	0.33	15,840	0.33	15,840	0.34	16,320
Eligibility & Enrollment Specialist	4,167	100%	12	50,000	0.33	16,500	0.33	16,500	0.34	17,000
Career Advisor AD/DW	4,000	800%	12	384,000	0.5	192,000	0.5	192,000	0	-
Career Advisor Youth	4,000	400%	12	192,000	0	-	0	-	1	192,000
Quality Assurance Specialist	4,000	100%	12	48,000	0.33	15,840	0.33	15,840	0.34	16,320
Regional Director	10,000	10%	12	12,000	0.31	3,720	0.31	3,720	0.38	4,560
Project Accountant	4,167	10%	12	5,000	0.32	1,600	0.32	1,600	0.36	1,800
				-		-		0		-
TOTAL SALARIES		2020%		1,059,000		351,100		351,100		356,800
2. Fringe Benefits										
FICA	7.65%	x	1,059,000	\$81,014		26,859		26,859		27,295
Workmens Comp	0.54%	x	1,059,000	\$5,719		1,896		1,896		1,927
Health-Welf. Ins. Pos	5,354.76	x	20.20	\$108,166		35,861		35,861		36,444
Ret/Pension		x		\$0		-		-		-
Unemploy. Ins.	6.00%	x	141,400.00	\$8,484		2,813		2,813		2,858
Other (Specify) SUTA	5.76%	x	282,800.00	\$16,289		5,401		5,401		5,488
TOTAL FRINGE BENEFITS:				\$219,672		72,830		72,830		74,012
3. Indirect Cost:										
	10%	x	1,278,671.53	127,867		42,393		42,393		43,081
An indirect cost plan must be submitted and approved prior to reimbursement.										
TOTAL COST				1,278,672		423,930		423,930		430,812

**Midlands Workforce Development Area
Budget Summary**

Bidder: _____
Solicitation #: _____

Operating Expenses	Cost Per Month	# of Months	Total Amount	Adult		Dislocated Worker		Youth	
				%	Amount	%	Amount	%	Amount
1. Supplies, Operating Expenses including recruiting, Software Licenses, etc.	\$2,294.33	12	\$27,532	33%	\$9,086	33%	\$9,086	34%	\$9,361
2. Communications			\$0		\$0		\$0		\$0
3. Postage	\$166.67	12	\$2,000	33%	\$660	33%	\$660	34%	\$680
4. Travel	\$1,666.67	12	\$20,000	33%	\$6,600	33%	\$6,600	34%	\$6,800
5. Equipment Rent			\$0		\$0		\$0		\$0
6. Equipment Expense			\$0		\$0		\$0		\$0
7. Premises Rent			\$0		\$0		\$0		\$0
8. Premises Expense			\$0		\$0		\$0		\$0
9. Miscellaneous - Career Edge, Insurance< Single Audit	\$8,666.67	12	\$104,000	33%	\$34,320	33%	\$34,320	34%	\$35,360
10. Capital			\$0		\$0		\$0		\$0
TOTAL			\$153,532		\$50,666		\$50,666		\$52,201

Career Team is pleased to present a detailed budget to provide workforce services to Midlands Workforce Development Board. Our overall budget is \$2,825,000. Career Team has developed detailed budgets by grant for Adult, Dislocated Worker and Youth within the three-county region (Fairfield, Lexington, and Richland Counties).

Staff Salaries. Program Operations Salaries for 20.2 FTEs are based on Career Team salary ranges and local market conditions in the South Carolina region. Personnel Salaries are budgeted at \$1,059,000. Proposed staffing levels are calculated based on Career Team experience operating similar projects, existing staffing levels, and customers served data ensuring reasonable customer-to-staff ratios for each of the Workforce Centers. Please refer to detail listing of positions by grant on the schedule of positions.

Employee Benefits. Staff Fringe Benefits is a combination of both Payroll Taxes and Fringe Benefits. Staff Fringe is budgeted at \$219,672. This is estimated at 20.74% of salaries.

Payroll Taxes are calculated as follows:

- Social Security & Medicare (FICA) – 7.65% of staff salaries.
- Federal Unemployment Tax (FUTA) – 5.4% x the first \$14,000 of staff salaries.
- State Unemployment Insurance – 5.4% x the first 7,000 of staff salaries.
- Workers' Compensation Insurance is budgeted at .0054 of total staff salaries.

Career Team offers a competitive employee benefits package designed to attract and retain employees. Career Team provides a mix of employer paid and employee paid benefits, including:

- Available immediately on date of hire: Medical Insurance, Dental Insurance, Vision Insurance, Health Savings Account (HSA), Employee Assistance Program (EAP), Employee Discount Program (PerkSpot), 401(k) - Employee contributions
- Available on 1st day of month following 60 days after date of hire: Life and AD&D Insurance, Short Term Disability Insurance, Long Term Disability Insurance, Accidental Injury Insurance, Critical Illness Insurance, Hospital Indemnity

Career Team subsidized benefits include medical insurance, life insurance and 401(k) match after the first year of employment.

Career Team encourages its employees to save for retirement through its 401(k) plan. Employees are eligible to contribute to the 401(k) plan on their first day of employment. After a year of service, employees become eligible to receive an employer match. Each pay period, Career Team will provide a 100% match on the first 3% of eligible employees' 401(k) contributions and a 50% match on the following 2% of eligible employee contributions. In other words, an employee who contributes 5% of his/her earnings to the 401(k) plan will receive an additional 4% of those earnings as an employer match.

The 401(k) Employer match is available after 1 year of employment therefore nothing is included in the first year of the budget.

Career Team also offers two employee assistance programs to all employees at no cost. We all know that life can be challenging at times. Issues like illness, debt, and family problems can leave us worried or anxious and unable to be at our best. Career Team is proud to offer both a robust employee assistance program through ESI Employee Assistance Group and a supplemental program through the Standard. These programs offer employees expert

guidance on any issue, from everyday matters to more serious problems affecting their well-being. Moreover, all support is confidential and offered at no cost to employees.

Health Insurance - Career Team recognizes that the cost of health insurance presents a significant burden for many workers in America today, especially those who have dependents that need coverage. For this reason, as such Career Team covers 100% of the health insurance premiums covering employees who enroll in the HSA-eligible plan. For those employees with dependents, Career Team will cover 90% of the premiums to cover dependents on the HSA-eligible plan. As a result, a family of 4 (or more) will pay only \$85.82 per pay period for health insurance - making health insurance significantly more affordable than with many other employers, while still offering employees a quality plan from a nationally respected carrier. Employees who prefer a PPO plan have the option to buy up to one of three different PPO plans, with Career Team contributing the same dollar amount toward those premiums that it would have for the HSA-eligible plan.

Health Care is calculated at the single Employee Benefit cost at an estimated enrollment participation of 65% (based on Career Team's experience). Employee participation in healthcare benefits varies as some employees may choose to opt out (e.g., covered by a spouse's plan).

Life Insurance - The company also provides \$25,000 of life insurance for each employee at a premium of \$1.63 per employee per month.

Office Expenses / Supplies - Career Team budgeted \$27,532. This is inclusive of Office Expense, Supplies, Outreach, Software Licensing, Recruiting, On-boarding, Printing/Shredding, Dues & Subscriptions, Staff Development, etc. These costs are based on Career Team experience operating similar projects and the size of each workforce center and anticipated level of effort required to maintain or exceed current participation levels.

Postage - is budgeted at \$2,000 based on Career Team experience operating similar projects for mailing and courier expenses.

Staff Travel - Career Team expects staff to spend considerable time in the community, building relationships, serving customers, and travel between Workforce centers and affiliate offices. Additionally, we intend to offer significant program support from our corporate team for management and training the staff. Our budget contains \$20,000 to support travel & mileage.

- In-Region Travel mileage is calculated using the 2026 federal mileage reimbursement rate of \$0.725.
- The cost of Career Team senior staff visiting the Midlands, South Carolina region for management and training of staff includes airfare, transportation, accommodation, and per diem expenses aligned with federal rates.

Insurance - is budgeted at \$2,500 based on Career Team experience operating similar projects for comprehensive insurance coverage.

Professional Fees Audit. The allocation of Single Audit, budgeted at \$1,500, is calculated based on Career Team experience operating similar projects.

Career Edge Annual Software License. This line item relates to the purchase of an annual, proprietary site license for use of the Career EDGE mobile assessable platform and content as it relates to all participants. Career Team will customize the platform to reflect the Midlands Workforce Development Board logo and will collaborate with leaders to identify features and functionality that enhance the current one-stop delivery system. Repurposing reduced program funds with more efficient online, mobile-friendly technology as opposed to adding staff (without this technology) is more prudent and cost effective for MWDB. This is budgeted at \$100,000.

Utilizing Career Edge online and teaching job readiness courses will be important to ensure we have positive outcomes from our referrals, and that they are presented to employers as job ready and can conduct remote mobile based interviews. This will provide staff and job candidates with 24/7 access to online content and tools. We have demonstrated this model to be extremely effective during the COVID pandemic and reaching VIPs in remote locations. Edge Highlights:

- Virtual, 24/7 mobile access workshop delivery for jobseekers and community partners
- Self-directed & instructor-led zoom job readiness activities (competency based)
- Virtual Interview Simulation Trainer (we expect 70%+ of interviews will now be online)
- Career Pathway & Personality assessments lead to better job matching of emerging in-demand jobs.
- State of the art Resume, Cover Letter builders & Online Application Simulation

Profit. Career Team has included a modest performance of \$114,576. This is calculated at 8% of direct program cost and is subject to MWDB's approval and pending the achievement of negotiated management and performance measures. Career Team LLC is a for-profit entity.

Indirect Costs. Career Team applies a de minimis rate calculated in accordance with federal regulations. The de minimis rate is 10% (of Program operating costs Inclusive of salaries, fringe benefits and operating costs). We have budgeted \$143,220 for Indirect Administrative Costs.

Participant Expenditures. Total Participant costs are budgeted at \$1,135,000. Career Team will work collaboratively with MWDB to allocate participant costs in a manner that creates the most return on investment. We will support Participants on their plan to reduce barriers to work and achieve long-term goals, Career Team will provide supportive service funding to an individual or family when in need. The budget reserves the following to support participants:

- Work-Based Learning Activities \$350,000
- ITA \$600,000
- Supportive Services \$185,000

**Midlands Workforce Development Area
Budget Summary**

**Midlands Workforce Development Area
Participant Services**

Career Team LLC

Bidder:
Solicitation #:

	Cost per Participant	No. of Participant	Total Cost	Adult		Dislocated Worker		Youth	
				%	Amount	%	Amount	%	Amount
I. Instructional Training									
1. Basic Skills/Diploma/GED			\$0		\$0		\$0		\$0
2. Occupational Classroom Training/ITA	\$3,000	185	\$555,000	50%	\$277,500	50%	\$277,500		\$0
TOTAL			\$555,000		\$277,500		\$277,500		\$0
II. Assessment Materials									
III. Work-based Learning Activities									
1. Work-Experience	\$3,500	100	\$350,000					100%	350,000
2. Transitional Jobs									
3. Internships/Apprenticeship									
4. On-the-Job Training	\$3,000	15	\$45,000	80%	\$36,000	20%	\$9,000		
5. Other									
TOTAL			395,000		\$36,000		9000		350,000
IV. Supportive Services									
1. Transportation									
2. Childcare									
3. Books, Supplies, Uniforms, Tools, Fees									
4. Other	\$2,467	75	185,000	38%	70,000	35%	65,000	27%	50,000
TOTAL			\$185,000		\$70,000		\$65,000		\$50,000
V. Incentive Payments									
TOTAL			\$1,135,000		\$383,500		\$351,500		\$400,000

SECTION FOUR
APPLICANT'S ORGANIZATION, EXPERIENCE AND FINANCIAL INFORMATION

Information regarding the following items shall be furnished in sufficient detail to allow a full and complete business evaluation. If a question is not applicable or the answer is none, it should be annotated as such.

- A. Name of Agency** or organization, contact email address, and website. If a non-governmental agency, provide the name under which you are incorporated.

Career Team, LLC

Name

Anthony@careerteam.com

email

careerteam.com

website

- B. Description of Method and System of Accumulating Costs** under Government Contract subject to Audit.

1. **Has your Accounting System been approved by any Government Agency?**

Yes

No If yes, name and location of Government Agency:

2. **Cost Accounting System** (General Description):

Career Team follows Generally Accepted Accounting Principles (GAAP) to ensure that all financial activities are recorded, reported, and managed in a consistent, transparent, and compliant manner. This means the organization adheres to standardized accounting practices for tracking revenues and expenses, managing grants and contracts, and preparing financial statements.

3. What was your overhead rate for your last completed fiscal year?

4. Has your indirect cost rate(s) been evaluated and accepted as current bidding rates by any Government Agency?

Yes

No

5. Provide a general description of purchasing procedures used, including comments on selection of sources, treatment of purchase discounts, and make or buy policy should be provided.

Career Team has provided a copy of our Procurement Policy.

- C. Does your company have all the necessary personnel, experience, and equipment to perform the work required or the resources to obtain such work and is your agency prepared to perform and complete the contract within the prescribed time frame? Make a definite statement:**

Career Team has the necessary personnel, experience, and equipment to perform the work required.

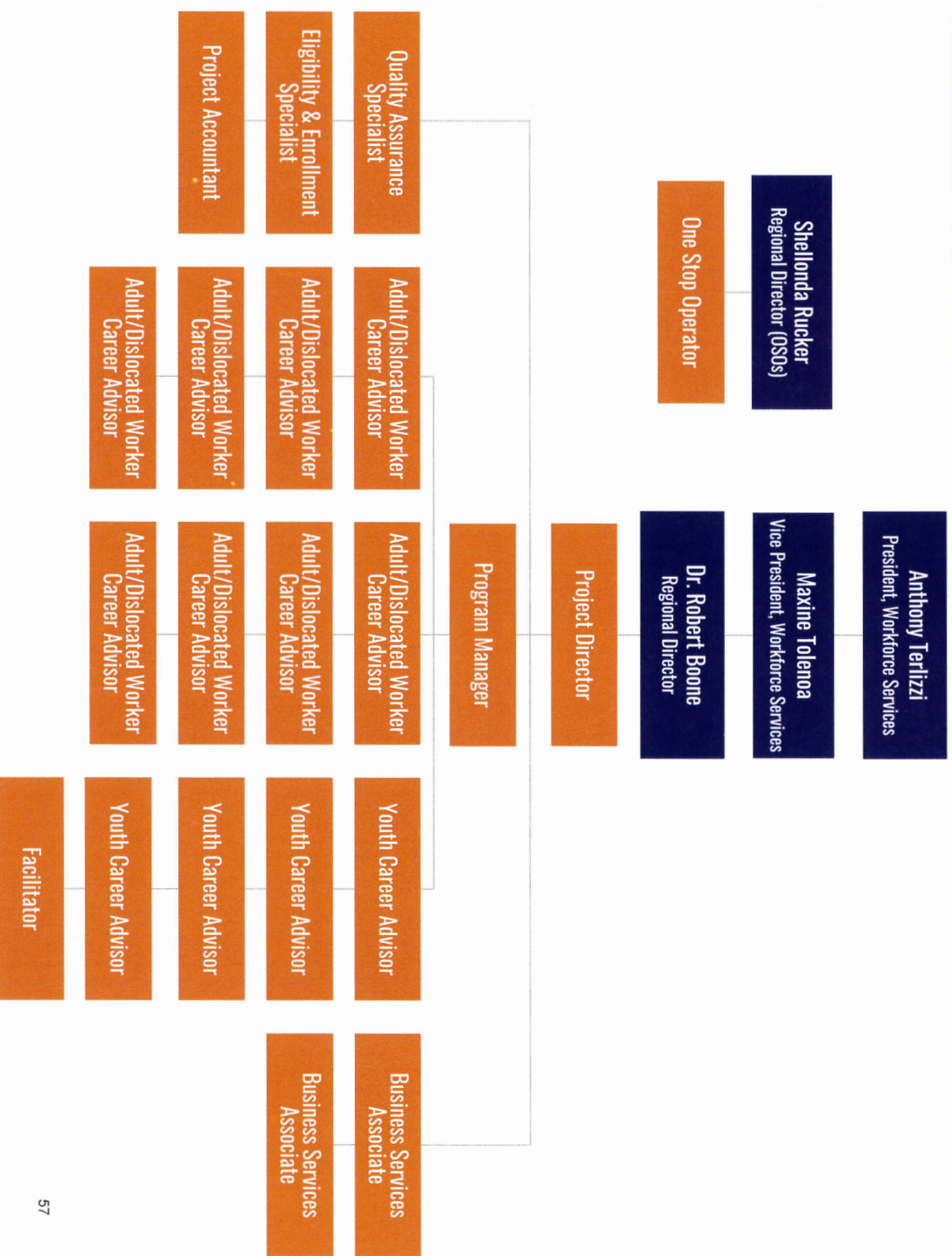
- D. Organization's Structure and Experience**

1. **Organizational Chart.** ATTACH a current organizational chart that outlines administration of proposed project. Include lines of authority and supervision for program operation.

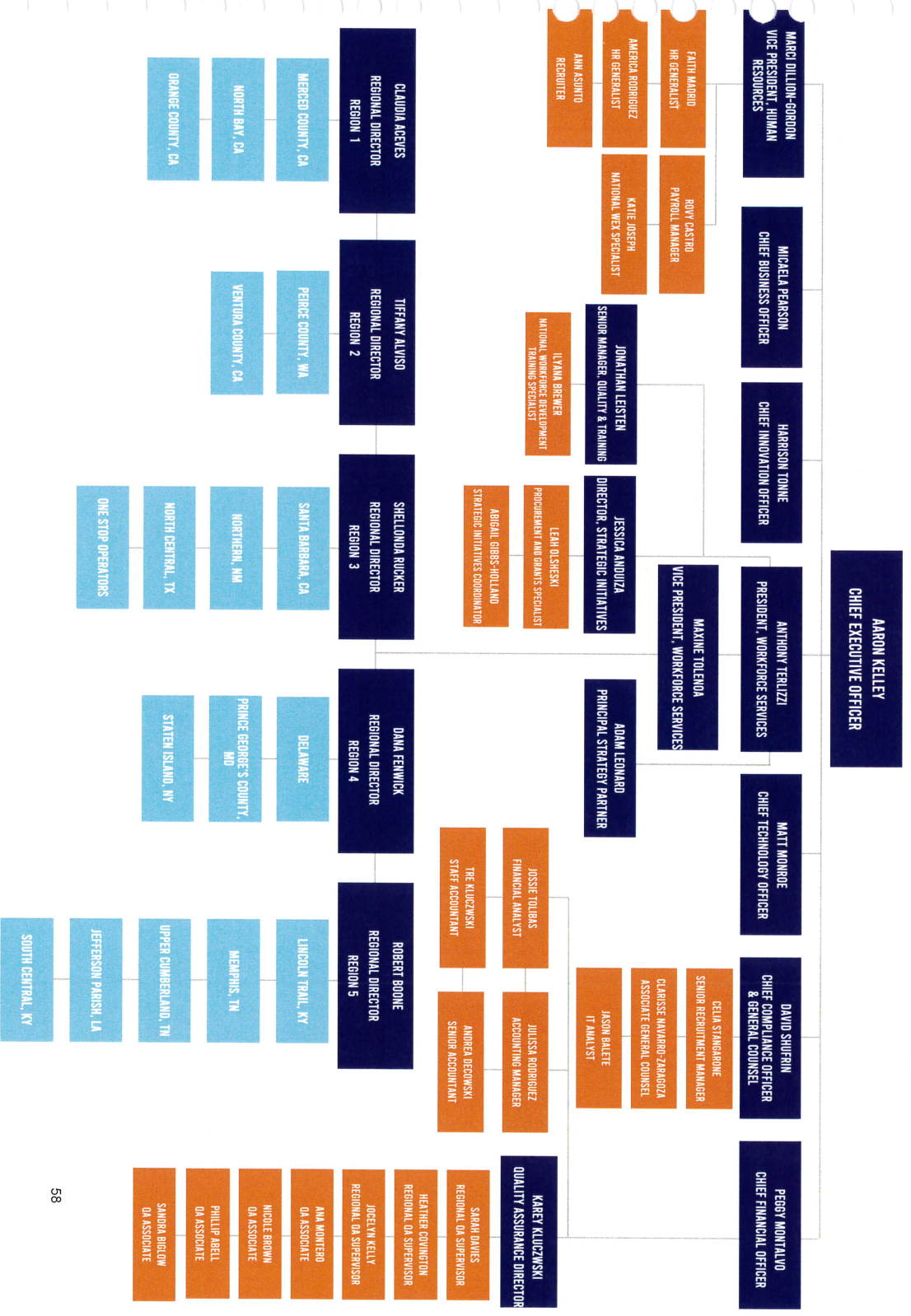
- a. After the award of a contract, all suitable employment openings must be listed with the local office of the S.C. Department of Employment and Workforce.
- b. Changes in the approved listing of key staff represent a contract modification and should not be made without prior notification to the Midlands Administrative staff. Notification must be submitted in writing to Midlands Administrative staff prior to any staffing changes.

Organizational Chart

MIDLANDS TEAM



COMPANY WIDE



References

Reference 1

Workforce Central

3640 South Cedar Street, Suite E Tacoma, WA 98409

Katie Condit, 541-647-8476, kcondit@workforce-central.org

Reference 2

Northern Area Local Workforce Development Board,

112 West San Francisco St. Suite 312 Sante Fe, NM 87501

Lisa Ortiz, 505-690-2591, lisa@nalwdb.org

Reference 3

South Central Kentucky Workforce Development Board

2355 Nashville Road, Bowling Green, KY 42101

Jon K. Sowards, 270-846-6707, jon@southcentralworkforce.com

Resumes

Anthony Terlizzi

10 Woods Way
New Fairfield, Connecticut 06812

(347) 306-0180
anthony.terlizzi23@gmail.com

SUMMARY STATEMENT

Seasoned professional with over 8 years of experience leading departments that exceeded expectations with high levels of positive consumer feedback while also maintaining regulatory requirements and assuring quality. A demonstrated history of competence, organization, decision making and excellent problem solving skills; able to set priorities and manage expectations. Highly motivated with a conscientious work ethic and proven success in planning and implementing projects under deadlines. Excellent communication skills, collaborative & team building abilities. Extensive leadership experience that demonstrates the ability to motivate a team and produce results.

EMPLOYMENT EXPERIENCE

CAREER TEAM

President, Direct Services Division

North Haven, CT
2018 - Present

- Oversee 25 million dollar workforce development portfolio.
- Responsible for 10 state workforce operations managing over 70 unique program funding streams
- Quadrupled contractual revenue within 3 years of employment
- Business Development activities including new sales, business relationship, proposal development and lead planning
- Responsible for overall budget, budget management, budget accountability and fiscal management

RESCARE

President, Direct Services Division

New York, NY
2015 - 2018

- Successfully manage a 7-million-dollar portfolio of projects in New York City
- Manage relationship with funder resulting in portfolio growth
- Provide executive oversight to a network of large scale and sector wide workforce development programs providing placement, recruitment, training, career advisement and wraparound services

FEGS

Assistant Vice President

Bronx, NY
2014 - 2015

- Increased placement performance by 200% in first 2 Quarters from previous year.
- Oversee a team of 34 frontline staff.
- Responsible for creating and designing processes for operation of the center.
- Manage vendor and community relationships.
- Oversee strategic business development plans for employers and recruitment initiatives for candidates under a program operating in a demand driven business model.
- Responsible for the implementation of all program rollouts and initiatives.
- Operationalize processes and manage teams to ensure performance across all indicators.

EDSI SOLUTIONS/WORKFORCE 1

Deputy Director

New York, NY
2011 - 2014

- Promoted from Senior Account Manager to Deputy Director, successfully directing a team of Account Managers that achieve sales and recruitment goals while fulfilling on job orders.
- Increased Upper Manhattan Career Center's annual placement performance numbers by 325%.
- Worked with a variety of businesses to plan, implement, and track customized recruitment projects to meet their specific recruitment needs.
- Supported a team of 14 Account Managers in developing relationships with local businesses and developing a network for job placement.
- Served as Interim Director in Center Director's absence, and exceeded quarterly performance targets in that time.
- Implemented recruitment processes and initiatives to ensure center performance.
- Collaborated with partners operating a multitude of programs to expand overall business portfolio
- Interviewed, hired and trained new staff.
- Created and implemented Business Development and Recruitment plans.

MAXINE TOLENOA

VICE PRESIDENT, WORKFORCE SERVICES

858-205-4419

maxinetolenoa@careerteam.com

San Diego, California

PROFESSIONAL SUMMARY

Dynamic and results-oriented Vice President of Direct Services at Career TEAM with over 15 years of specialized experience in workforce development. Recognized for exceptional leadership in managing multi-unit teams, aligning strategic initiatives with organizational goals, and fostering a culture of continuous improvement. Adept at orchestrating innovative programs and initiatives that drive service delivery excellence and competitive positioning in the workforce development industry.

EXPERIENCE

Career TEAM

February 2023 - Present

Vice President, Direct Services

- Lead the operations of the Direct Services Division, inspiring multi-unit teams and executive leaders to achieve successful outcomes.
- Develop, communicate, and implement the organization's vision, mission, and strategic direction.
- Collaborate with Senior Leadership to monitor KPIs and ensure project and program success.
- Drive the development and execution of strategic plans to guide business growth and innovation.
- Conduct on-site reviews across all Career TEAM locations to ensure operational excellence.
- Facilitate weekly check-ins with Executive Directors and Regional Directors to align goals and priorities.
- Stay attuned to competitive landscape, market opportunities, and industry trends to inform strategic decisions.
- Champion innovative thinking and a "Zag" mindset to foster continuous improvement.

KRA Corporation

July 2022 - February 2023

Director of Workforce Operations, Strategic Initiatives

- Led and provided performance oversight for workforce operations contracts ensuring optimal outcomes and adherence to strategic goals.
- Supported business expansion, development, and organizational growth through targeted initiatives and strategic planning.
- Oversaw organizational development efforts, including Continuous Quality Improvement (CQI), communications, and program development to enhance operational efficiency.
- Facilitated the integration of new initiatives into program operations and business development for seamless execution and alignment with company goals.

MAXINE TOLENOA

RESUME CONTINUED

EXPERIENCE (CONTINUED)

KRA Corporation

July 2022 - February 2023

Director of Workforce Operations, Strategic Initiatives (continued)

- Ensured compliance with local, state, and federal regulations, contract terms, and company operating procedures, including the Business Practices Manual.
- Coached and developed Program Managers, fostering professional growth and leadership capabilities.
- Collaborated with executive leadership to design and implement a comprehensive leadership and management succession plan.

KRA Corporation

October 2016 - July 2022

Director of Workforce Operations

- Supported Program Managers in achieving Workforce Innovation and Opportunity Act (WIOA) contract performance goals through effective team management, program delivery, and quality evaluation.
- Established and approved project-specific policies and procedures to ensure operational excellence and strict contract compliance.
- Fostered a positive, proactive, and results-driven oriented work culture aligned with company values, emphasizing Continuous Quality Improvement and the corporate Quality Service Model.
- Provided operations leadership for America's Job Centers of California (AJCC) and other start-ups, coordinating corporate resources to ensure seamless program implementation.
- Contributed to identifying strategic growth opportunities and qualifying business development targets to support long-term organizational success.

KRA Corporation

July 2012 - October 2016

Program Manager

- Designed, implemented, and managed workforce operations to achieve program objectives and align with organizational goals.
- Delivered instructional programs focused on workforce development, life skills, higher education, and financial management, adhering to client funding provisions.
- Served as mentor, trainer, and manager, guiding teams in defining and implementing policies, procedures, and performance metrics.
- Established and enforced quality and performance standards to ensure program effectiveness and client satisfaction.

MAXINE TOLENOA

RESUME CONTINUED

EXPERIENCE (CONTINUED)

JobWorks Inc.

September 2011 - July 2012

Operations Manager

- Managed and operated year-round Workforce Investment Act (WIA) Program for Adults and Dislocated Workers, overseeing daily staff activities, client job searches, and program enrollments.
- Coordinated and planned daily activities at the One-Stop Center (OSC) ensuring seamless service delivery with integrated partners and co-located agencies.
- Monitored, collected, and analyzed program performance data, preparing comprehensive reports and implementing innovative solutions to address project or OSC-related issues.
- Developed and executed strategic plans for OSC program components, ensuring alignment with organizational goals and recommending actions to achieve desired outcomes.
- Provided leadership and guidance in cross-training and events to foster collaboration among offices, divisions, and partnering agencies.
- Served as a liaison to partners, employers, training programs, and participants, strengthening relationships and facilitating program success.
- Assisted corporate management in developing annual budgets, service plans, and program designs to enhance service delivery and program effectiveness.

JobWorks Inc.

June 2010 - September 2011

Performance and Quality Assurance Manager

- Reported directly to the Operational Manager and Program Specialist at the San Diego Workforce Partnership, ensuring alignment with organizational objectives and partnership goals.
- Evaluated, coordinated, and monitored program activities to ensure compliance with federal, state, and local Workforce Investment Act (WIA) rules and regulations.
- Prepared comprehensive reports on program activities and outcomes to meet and exceed contractual performance agreements, implementing resolution processes when needed.
- Delivered extensive internal training on performance measures, equipping staff with tools and recommendations to enhance service delivery and improve customer engagement and certification rates.
- Collected, analyzed, and reported on program performance data, contributing to fiscal year outcomes that exceeded targeted goals.

MAXINE TOLENOA

RESUME CONTINUED

SKILLS

- Leadership
- Strategic Planning
- Program Management
- Succession Planning
- Employee Coaching
- Organizational Development & CQI
- Contract Compliance
- Quality Assurance
- Policy Development
- Partnership Building
- Problem Solving
- Critical Thinking
- Tech Savvy
- Conflict Resolution

EDUCATION

- University of California San Diego Extension** 2011 - 2012
San Diego, CA
- Career Advising Specialized Certificate
- University of San Diego** 2007 - 2008
San Diego, CA
- M.A. Peace and Justice Studies, Cum Laude
- Mount St. Mary's University** 2003 - 2007
Los Angeles, CA
- B.A. Sociology with an emphasis in Criminology, Magna Cum Laude
 - Pre-Law Minor

AFFILIATIONS & ACHIEVEMENTS

- National Association of Workforce Development Professionals** 2023 - Present
NAWDP California State Director
- California Workforce Association** 2021 - 2022
CWA Executive Bootcamp, Season 9
- National Association of Workforce Development Professionals** 2015 - 2019
NAWDP Regional Director (Region 9 - AZ, CA, GU, HI, NV)
- National Association of Workforce Development Professionals** 2012 - Present
Certified Workforce Development Professional (CWDP)

Robert Boone, EdD, MPA

227 Sutton Street
Maysville, KY 41056

Phone: (606) 584-4842
robert@careerteam.com

Professional Experience, 2004 – Present

Regional Director of Operations, Career Team, Ohio, Kentucky, Tennessee, and Louisiana (February 2021-Present)

- Successfully provided leadership to local WIOA Title I operations in four states spanning both rural, suburban, and urban regions.
- Facilitated collaborative approach with local teams to build innovative program design to reach career-seekers and employers in the arenas of re-entry/justice involved, substance abuse treatment, and out-of-school youth.
- Successfully utilized labor market data and proposal writing skills to provide value-add to workforce boards in securing additional funding streams, including the launch of two training programs.
- Regularly leverage past experience as a workforce board CEO, training provider, and local elected official to support our workforce board customers in reaching strategic organizational goals.

President/CEO: South Central Workforce Development Board, Bowling Green, KY (August 2017-February 2021)

- Recruited and led an all-star team, consisting of eight direct reports, to build a highly effective multi-million-dollar workforce system from scratch, making all the below possible:
- Increased recurring revenue by over \$1.5 million within first year and over \$2.5 million within second year through strategic fundraising and community-building initiatives.
- Created a non-profit community enterprise, SCKY Foundation for Workforce Development, Inc., to stimulate funding and programmatic diversification and to expand the mission of the South Central Workforce Development Board.
- Developed an affiliate site model for accessibility in service delivery consisting of over 20 access points leveraging existing resources throughout the organization's 10-county service region, including the implementation of virtual career services in partnership with Career Edge.
- Developed a registered apprenticeship intermediary concept through the creation of the non-profit, myworkforcefuture, Inc., to expand apprenticeship opportunities in Kentucky, leading to over \$600,000 in start-up capital over a two-year period.
- Led the development of several key post-secondary training programs in collaboration with training providers including the launch of a three-location regional CDL program in partnership with the Southcentral Kentucky Community and Technical College (SCKYCTC) and the creation of a regional computer coding bootcamp, Kentucky Coders.
- Served as an active member of a 10-county service region with complex and challenging stakeholder relationships consisting of employers, elected officials, chambers of commerce, economic development organizations, and other non-profit and community partnerships.
- Led the development of a strategic-plan based recruitment strategy (with about a 45% increase in program recruitment and retention) for our participants and students, focusing on the industry sectors of: Manufacturing, Construction, TDL, Business/IT, and Healthcare as well as the participant/student focus populations of: Transitioning Military Service Members/Veterans, Secondary/Post-Secondary School Students, New Americans, and the Long-Term Unemployed.
- Played an integral workforce development role in the 2020 Global Trade Magazine recognition of Bowling Green as the #2 City in the United States for Manufacturing, along with the recognition of the south central, Kentucky region as the fastest growing area in the Kentucky.

Founding Director: Center for Career Development and Experiential Learning, Sponsored by Dayton Power and Light: Maysville Community and Technical College (2014-Present)

- Proposed, developed, and secured funding to create the Center for Career Development and Experiential Learning to meet regional workforce goals within our college's 19-county service area, which assisted more than 1500 students and community members along with over 50 businesses in 2016.
- Oversaw the college's Accelerating Opportunity (AOKY) program, Workforce Transitions initiative, Career Services Department, and business/student recruitment for Northeast KY FAME Chapter.
- Coordinated credit and non-credit experiential learning opportunities, including apprenticeship, internship, co-op, and study abroad.
- Consulted with business/industry clients to meet workforce needs through customized training options, work-and-learn experiences, job placement, and credential programs.

Corporate Trainer: Maysville Community and Technical College, Maysville, KY (2011-Present)

- Facilitated eight-hour accountability trainings in QBQ (Question Behind the Question) for corporate clients.
- Instructed a series of four two-hour sessions on meeting facilitation for corporate clients
- Taught an independent study titled *Portfolio Development for Credit for Prior Learning* to work in conjunction with our Prior Learning Assessment program.
- Coordinated and instruct experiential learning programming (co-op, internship, and apprenticeship).
- Regularly earned "excellent" ratings and very positive comments from training participants (.pdf versions of evaluation results are available upon request).

Commissioner: City of Maysville, KY (January 2015-January 2017)

- Elected to serve the more than 9,000 citizens of Maysville as the youngest city commissioner in 35 years, with a platform focusing on economic development, tourism, and city branding.
- Oversaw an annual budget of over 12 million dollars and a reserve fund of over 9 million dollars.
- Assisted in the hiring of five new administrative-level personnel in 2016, which set a city record for management-level transition.
- Led efforts to gain governmental and community support for a regional seven-county economic development strategy, sought grant funding for and voted to support millions of dollars in infrastructure upgrades in our city's four industrial park sites, collaborated with two local business advocacy groups (Maysville Open for Business and the Maysville-Mason County Area Chamber of Commerce) in requesting city support for business incubator funding and marketing, led in the institutionalization of city-wide "green initiatives" to tie into a an economic development strategy to recruit and retain the next generation workforce.

Project Manager, Workforce Transitions: Maysville Community and Technical College, Maysville, KY (2011-2014)

- Developed Workforce Transitions initiative from the ground up and created innovative strategies and programming to keep our college competitive within KCTCS, allowing us to rank as high as 2/16 in the state for number of students transitioning into credential programs.
- Aligned the learning management system of a local company, STOBBER Drives, to the ISX 100, IMT 150, and IMT 150 curricula at our college, allowing for Stober employees to earn college credit while completing internal trainings, thus incentivizing the transition to college-level coursework

- Created a standardized program for Credit for Prior Learning, which has become a state model and served as a key contributor to the System-level PLACE (Prior Learning Accelerates Credit Earning) initiative and handbook.
- Developed the *Jump Start Scholarship*, which is a tuition reimbursement scholarship that pays for the first six credit hours of an employee's tuition, enabling them to overcome the initial financial hurdle of paying for college tuition up front.

Post-Secondary Workforce Development Coordinator: Buffalo Trace Area Development District, Maysville, KY (2010-2011) Project Manager, Workforce Transitions: Maysville Community and Technical College, Mays

- Designed supportive services and educational programming for a cohort of 50 dislocated, incumbent, or unemployed workers for a U.S. Department of Labor funded training program that was geared toward employing Registered Nurses in medically underserved areas of Kentucky.
- Served as interim director for the 2-million dollar grant project, ensuring that all reporting and benchmarks were being met.
- Acted as the liaison for the grant program in the community, detailing the program's successes to the media, to regional community groups, and at conferences.

Director of Restorative and Therapeutic Activities: UniHealth Post-Acute Care/Athens Heritage, Athens, GA (2008-2010)

- Managed daily operations of the Restorative and Therapeutic Activities department (including weekend facility operations) in a 114-bed rehabilitation and long-term care facility, resulting in zero citations during state inspections for the duration of my tenure.
- Developed experiential learning programming in conjunction with the University of Georgia's College Of Public Health and the Allied Health Division of Athens Technical College from scratch, which resulted in our facility becoming recognized as a premier internship and practicum location in the Athens-Clarke County area.
- Supervised 10 full-time employees and more than 60 volunteers/students.

Research Assistant and Project Manager: The University of Georgia, Athens, GA (2004-2008)

- Utilized training in statistical methods, research design, and analysis software (SPSS and Excel) to analyze data and conduct human-centered research for faculty publication and presentation.
- Presented findings at numerous regional and academic conferences, where the skill of adapting to multiple audiences was key.

Education and Training

Doctor of Education (Ed.D.) Education Policy Studies, Measurement, and Evaluation Workforce Development Focus University of Kentucky, Lexington, KY	2019
Master of Public Administration (MPA) Emphasis: Non-Profit Management and Community Development Morehead State University, Morehead, KY	2014
Bachelor of Science, Psychology (BS) Focus: Industrial/Organizational Psychology University of Georgia, Athens, GA	2008
Community and Economic Development Course Kentucky Institute for Economic Development Lexington, KY	2014

PEGGY MONTALVO

(203) 543-0766 | peggymontalvo@yahoo.com | 95 Lantern Road, Stratford, Connecticut 06614

SUMMARY

A highly accomplished and results-driven SENIOR FINANCE EXECUTIVE, with domestic and international experience across a broad range of industries. A logical thinker and innovative change agent, who leads initiatives to ensure fiscal stability. Adept at cost-cutting and increasing productivity – without sacrificing quality – by quickly identifying deficiencies and implementing systems and process improvement strategies across multiple disciplines. A motivator and mentor, who values others; fosters opportunities for continuous development and thrives in a fast-paced, challenging environment. With a solid commitment to excellence, lays the foundation for long-term success and profitability.

Finance and Accounting
Business Process Reengineering
Financial Reporting and Analysis

Budgeting and Forecasting
Project Management
Finance Transformation

Internal Controls and Compliance
Financial System Implementation
Mergers and Acquisitions

EXPERIENCE

CAREER TEAM LLC

North Haven, Connecticut

Career Team provides innovative solutions to complex social challenges such as closing the opportunity divide, reducing unemployment and eradicating poverty.

Chief Financial Officer

2019–Current

- Responsible for all fiscal and financial activities for Career Team LLC and Career Edge LLC.

ECP-PF HOLDING GROUP INC

Orange, Connecticut

One of the largest Planet Fitness franchisees with over 100 Planet Fitness clubs under management in the US and Canada. The company grew over 65% during tenure with 4 separate acquisitions totaling 25 clubs and the construction of an additional 15 clubs.

VP Finance / Corporate Controller

2017–2019

- Managed and directed the day-to-day accounting operations, including accounts payable and cash management for over 100 locations.
- Identified opportunities to streamline accounting operations to improve efficiency and effectiveness of team.
- Prepared all monthly, quarterly and annual GAAP operating results and financial position for the Board, Bank, Investors and Senior Leadership Team.
- Managed the monthly close and assured rigorous control of company balance sheet with monthly reconciliation of all accounts and P&L analytics by club/region.
- Implemented Intacct Fixed Asset module integrated to GL and AP with over 22,000 assets for all clubs and corporate locations.
- Managed annual audits and tax audit/compliance for all US and Canadian legal entities. Facilitated and managed sales tax, excise tax, property tax, PST and GST Audits.
- Ensured preparation and filing of required tax, regulatory and insurance claims/filings.
- Managed all third-party relationships with Insurance, Banks, Auditors, Tax Authorities and Vendors.

GLOBAL PARTNERS LP

Branford, Connecticut

A distributor/marketer of petroleum products and one of the largest independent owner, supplier and operator to 1,500 gas station and convenience stores in the Northeast and Mid-Atlantic. Revenues \$8B.

Divisional Controller

2015–2017

- Managed and directed the day-to-day accounting operations for the Gasoline Distribution and Station Operations Division of Global Partners. Consisting of a team of 75 within Retail Accounting, Accounts Receivable, and Accounts Payable Departments.
- Developed and implemented process reengineering efforts to streamline and automate Operational Accounting processing for a high volume, transactional, manual environment – resulting in improved accuracy, efficiency, productivity and cost cutting.
- Represented Operational Accounting and led accounting efforts on all company-wide projects, system implementations, enhancements, upgrades, acquisitions, divestitures, etc.
- Effectively collaborated cross-functionally within the Company to build and maintain strong relationships at all levels; implemented changes to better serve “internal” customers and solve problems in efforts to enable continuous improvements.
- Mentored team to be efficient and high performing, led change management efforts, developed formal process and training documentation, provided opportunities to cross-train team members - developing new skills which often times led to promotions. Created an environment which promotes a respectful, friendly, professional environment which fosters change and development.
- Responsible for the balance sheet reconciliation of all operational accounts, managed the monthly, quarterly and year-end closing processes and audit preparation for five separate legal entities.
- Managed relationships with all third-party providers, Credit Card Processors, etc.
- Managed external and internal audit interactions; drove efforts to enhance control documentation and testing.

PMM FINANCIAL CONSULTING

Stratford, Connecticut

Owner

2013-2015

Independent Contractor provided accounting, finance, CFO Services, financial process reengineering and change management. A business partner - working with clients to achieve their strategic goals.

HOMESERVE USA

Stamford, Connecticut

North American arm of a global home emergency repair service plan provider in the US and Canada. Global Revenues of 584M

Vice President of Finance and Governance

2011-2013

Led accounting, tax, treasury, insurance, and risk and governance activities for US business – managed a team of over 30 professionals. Directed corporate governance initiatives across company, including development and implementation of policies, ensuring company maintained rigorous and robust internal control environment and that accounting remained in accordance with IFRS standards and HomeServe Group plc policies. Managed interactions with external and internal auditors. Coordinated reengineering and transformation of business processes that underpinned company's finance statements. Led implementation efforts for new global financial transformation, including the implementation of Oracle R12. Contributed to 18% revenue growth over past fiscal year for the US Company.

- Led global implementation efforts for the U.S. Company of Oracle R12 General Ledger, Accounts Payable, Fixed Assets, and iProcurement. Designed and implemented a new global Chart of Accounts to support financial reporting requirements. Streamlined payables processing by implementing ACH payment functionality and automating source system interfaces.
- Collaborated with UK colleagues on the Global Design of the Financial Data Warehouse, Financial Accounting Hub, Hyperion Planning, and HFM. Defined global KPIs and design of a Global Financial Reporting Portal.
- Analyzed and reengineered key business processes across the organization to improve efficiency, effectiveness, and controls. Deployed technological advancements to automate manual processes wherever possible.
- Developed key controls consistent with Sarbanes-Oxley standards. Ensured corporate accounting policies were in accordance with IFRS and plc group accounting guidance.
- Created and implemented robust risk management and compliance process in accordance with plc group guidelines and reported progress to plc group monthly and to U.S. leadership at all SMT and board meetings.
- Ensured preparation and filing of required tax, regulatory, and insurance filings for all U.S. legal entities. Worked closely with outside tax advisors to ensure filing of federal, state, and local returns on timely basis.
- Directed gradual expansion of treasury activities in U.S. with careful coordination with plc group. Oversaw all cash management procedures and cash flow forecasts. Established a local line of credit facility.
- Managed the migration and integration of all transactional accounting from an acquisition in New York to consolidate into existing operations in the Miami-based accounting team – resulting in a savings of \$600,000 per annum.

TABCOM, LLC

Hazel Township, Pennsylvania

Multi-divisional, multi-channel e-tailers providing pet, equine, garden and green space products across 5000 websites with 1M+ visitors each month and annual revenues of \$70M.

Chief Financial Officer

2009-2011

Served as strategic and tactical Chief Financial Officer, responsible for all accounting, finance and human resource activities, architecting, and driving strategic turnaround.

- Improved EBITA by \$3,000,000 (50% year over year) via aggressive process improvement, cost controls, and vendor negotiations.
- Transformed finance department, focusing on accuracy, control, and accountability. Developed SOPs and company policies and procedures, which resulted in improved efficiency and productivity.
- Developed daily and monthly financial reporting and analysis, providing full P&L by division, allowing executives and shareholders to clearly understand ROI of vertical e-commerce divisions and comparisons to budgets.
- Migrated company to new cash management and banking relationship with Wells Fargo.
- Developed Business Case and drove negotiations to move warehouse operations to a third-party provider.
- Reduced shareholder and external funding by 40% year over year.
- Implemented new HR and employee evaluation system for more than 200 employees.
- Reduced inventory value by \$4,000,000 year over year.
- Oversaw business integration and due-diligence research and legal review for merger and acquisition.

DELOITTE TOUCHE TOHMATSU

Wilton, Connecticut

A leading Big-4 Professional Services firm which provides audit, consulting, financial advisory, risk management and tax services.

Senior Manager, Global Independence, Ethics and Compliance

2005-2009

Partnered as leader in Deloitte's global firm, managing independence compliance of more than 165,000 professionals in 140 countries.

- Represented company in collaborative independence working group of Big 4 firms and managed entity and relationship global master file of clients and associations.

- Managed global colleagues in collecting and maintaining clients' corporate entity hierarchies for scope of service compliance and internal global financial reporting.

DELOITTE CONSULTING

Stamford, Connecticut

Senior Manager, Strategy and Operations, Finance Transformation Services

1998-2005

Provided consultancy services to clients, focusing on strategy and operations in finance area. Worked with Fortune 100 firms in providing value-added services to bridge gap between vision and execution. Completed extensive work in finance transformation and enhancing financial close, consolidation, reporting, budgeting, and planning processes. Led ERP implementations primarily within the Oracle. Managed Sarbanes Readiness programs, implementing systems, processes, and controls to facilitate Sarbanes-Oxley compliance and sustainability.

- Clients included: Applied Graphics Technologies, Cablevision, Computer Associates, Global Crossing, Interpublic Group, Mercator, MTV Networks, Oxford Healthcare, Pfizer, Reader's Digest, Société Générale, Tyco, United Technology, and Verizon.
- Conducted evaluation of close and consolidation process, which included consolidation of over 1,200 legal entities. Managed global Hyperion HFM implementation. Facilitated vendor selection for budgeting and planning solution, and managed Cognos implementation to facilitate detailed project and portfolio planning.
- Identified opportunities for improving and enhancing operations in order to accelerate monthly close. Identified global requirements for financial process reengineering. Developed process flows and documented control environment.
- Defined financial reporting requirements and report design specifications, including restructuring chart of accounts, interfaces, and account roll-ups, and managed development of data warehouses to enhance financial reporting and financial processing.
- Advised financial executives on strategic financial ERP planning. Developed RFPs and facilitated vendor selection. Defined global financial requirements for system implementation. Managed ERP implementation of all finance modules, including global rollout and implementation of second-wave General Ledger functionality for consolidations and allocations.

MICRO WAREHOUSE INC., Norwalk, Connecticut

1991-1998

A \$2B international catalog retailer and direct marketer of computer hardware / software.

Special Projects, PeopleSoft General Ledger Implementation Lead

1997-1998

Served as member of team responsible for software selection, design, development, data conversion, interfaces, testing, and training of multimillion-dollar financial solution implemented in all of company's worldwide operations. Led efforts for General Ledger and Accounts Payable modules – leveraged international experience to identify and implement all global requirements.

- Developed functional requirements and reengineered business processes to maximize process improvements. Redesigned chart of accounts to align with reporting, as well as converted two years of detailed data from legacy systems.

Manager, International Accounting and Financial Operations

1994-1997

Oversaw financial consolidation, budgeting, and financial controls of all Micro Warehouse International's subsidiaries in North America, Central America, and Pacific Rim. Held domestic responsibilities to include financial oversight of all operating activity, including inventory, receivables, gross-margin transactions, internal audit, financial systems troubleshooting, and procedures and financial controls.

- Served as acting financial controller, responsible for daily financial activity of Canadian operations, with annual sales of \$67M. Integrated financial functions of Canadian operations with domestic operations, resulting in annual cost savings of \$300K.
- Contributed significantly to merger and system conversion of \$360M international reseller.

Financial Controller, Micro Warehouse France SARL

1992-1994

Responsible for all financial activities for \$127M subsidiary, including accounting, purchasing, distribution/warehousing, human resources, and payroll. Grew French subsidiary over 210% during tenure.

- Contributed to system conversion and implementation, training, financial reporting, and budgeting for 28 international acquisitions, mergers, and start-ups in 15 countries.

ADDITIONAL EXPERIENCE

FUNK SOFTWARE, Cambridge, Massachusetts, **Accounting Manager**, 1990-1991

LIBERTY REAL ESTATE, Boston, Massachusetts, **Staff Accountant**, 1988-1990.

EDUCATION

SACRED HEART UNIVERSITY, Fairfield, Connecticut

M.B.A.

UNIVERSITY OF SOUTHERN NEW HAMPSHIRE, Manchester, New Hampshire

B.S., Management Advisory Services, Double Major: Accounting and Management Information Systems

SYSTEM EXPERIENCE

Oracle, PeopleSoft Financials, Sage Intacct, Multiview, PDI, eCometry, Hyperion, QuickBooks, Excel, PowerPoint, Workday - Adaptive

Marci D. Dillion, MBA

(347) 301-5057, dillion.marci@live.com, [linkedin.com/in/marci-dillion-mba-shrm-scp-b3386a41](https://www.linkedin.com/in/marci-dillion-mba-shrm-scp-b3386a41)

An energized and tactful Human Resources professional who specializes in strategic succession planning, employee engagement, and benefits administration.

WORK EXPERIENCE:

Director of Human Resources

Career TEAM/Career EDGE, LLC.

June 2021 to Present

HQ - Connecticut

- Focus on diversity initiatives and drive corporate culture, the fun way!
- Spearhead the creation of the company's Committee on Culture and lead the charge to improve employee recognition, contests and quarterly events;
- Participate in the initiation of the company's first Total Rewards analysis and strategy development by participating in interviews and drafting short term and long term goals for HR and other key departments.
- Research market trends and emerging best practices to ensure Total Rewards programs remain market competitive;
- Assess organizational needs and recommend appropriate technology/3rd party consultants to streamline processes;
- Act as a mentor to a dynamic, nationwide HR team consisting of Recruiters, HR Generalist, and Payroll Coordinators;
- Develop, strengthen and implement HR policies across 12 states and company functions;
- Ensure nationwide compliance with HR laws and regulation including states such as CT, TX, CA and WA;
- Evaluate, redesign, and administer health and welfare, retirement and leave benefit programs to increase effectiveness and impact programs, while ensuring coordination and understanding of programs and compliance with state/government regulations;
- Manage all aspects of benefits administration and broker relationships;
- Perform payroll related activities for 300+ employees including garnishments, pay/employment profile updates and payroll register reviews;
- Analyze data from a variety of reports to affect change across the organization. Some of these reports include internally developed surveys, pay data reports extracted from ADP, exit interviews, etc.;
- Improve efficiency of recruiting, hiring, and onboarding processes; instrumental in the procurement and implementation of Greenhouse, the company's ATS;
- Travel across the country to assist with team-building exercises, investigations and other sensitive personnel matters.

Director of Human Resources

CHOICE of New Rochelle, Inc.

October 2016 to June 2021

Westchester County, NY

- Strategically support a multi-site case management agency while providing managerial support to the Human Resources Staff.
- Efficiently conduct various investigations, document findings in accordance to guidelines, and recommend corrective actions to mitigate future incidents. During this entire process, the highest level of confidentiality is maintained.
- Reduce turnover by creating various employee incentive programs, such as, Employee of the Month, company-wide outings, and performance-related bonuses.
- Lead various orientations to ensure employees understand the agency's code of conduct, policies, and benefits.
- Analyze current business operations to create policies and procedures that best support future Agency needs.

- Serve as an advisor to the management team by providing solution-based and HR related solutions to promote the development of all employees. The goal is to continue to reward and promote employees from within the organization.
- Provide day-to-day performance management counsel to the team and participate in all Agency-wide performance evaluations.
- Tactically quadruple the organization's employees. This was accomplished by leveraging social media platforms, as well as, building relationships with the career development departments of various colleges and universities within New York State to recruit qualified candidates for available positions.
- Collaborate with insurance brokers to provide the most competitive benefits package to employees.
- Process and administer Human Resources transactions concerning employee records, including onboarding paperwork, status change, salary change, benefits enrollment, benefits administration, separation, and exit interviews.
- Orchestrate yearly audits on all Agency Form I-9s and personnel files to maintain compliance with appropriate federal, state, and local guidelines.
- Spearheaded the 2016 ADP implementation team and give ongoing trainings to ensure efficient use of the various ADP products.
- Expeditiously respond to NYS Unemployment Insurance claims resulting in an 80% decrease of unemployment insurance expenditures between 2015 and 2019.
- Serve as an integral member of the Agency's Corporate Compliance team which meets quarterly to review all issues and set measures to ensure the Agency remains in compliance with Medicaid and other governing bodies.

VOLUNTEER EXPERIENCE:

Jobs Opportunity Volunteer

Inner-City Scholarship Fund

January 2018 – Present

Bronx, NY

- Co-facilitate workshops to help inner-city high school students develop the critical skills they will need as successful college students and working professionals.

Human Resources Committee Member (SPPRC)

Butler Memorial United Methodist Church

November 2017 – Present

Bronx, NY

- Serve in an advisory capacity between the district leadership and the local church.
- Recommend needed staff positions, approve job descriptions, and consult with the Finance Committee around appropriate compensation, travel, housing, and other financial matters.
- Weigh several factors, such as culture, age and stage of congregants, when making key decisions around staffing and programming.
- Assist with the annual evaluations of the church's leaders and other staff for ongoing effective impact.
- Make recommendations to the chair of the committee regarding State and City mandates, ex. NYS Anti-Harassment training and labor law posters.

EDUCATION:

Master of Business Administration: Human Resource Management

Iona College – New Rochelle, NY

Bachelor of Business Administration: Management

Iona College – New Rochelle, NY

CERTIFICATIONS:

Health Care Information Systems: Advanced Certification

Iona College - New Rochelle, NY

PROFESSIONAL MEMBERSHIP:

Society for Human Resource Management – Active Membership as of October 2015

KAREY KLUCZWSKI

Plano, TX

(860) 331-7224 • karey@careerteam.com

SUMMARY

Highly motivated, ambitious, resourceful professional with experience supporting multiple projects on national scale. Competitive by nature, with proven outcomes in quality assurance, fiscal processing and business development. Execution-oriented, with the ability to prioritize multiple projects at once. Adept at incorporating industry-based insight to site-level execution.

SKILLS / CORE COMPETENCIES

- | | | | |
|---------------------|---------------------|---------------------------|---------------------|
| ● Compliance | ● QuickBooks | ● Account Reconciliations | ● Detail Oriented |
| ● Data Collection | ● Microsoft Suite | ● Creative Problem Solver | ● Netspend/Skyposit |
| ● Variance Analysis | ● ADP Workforce Now | ● Process Improvements | ● Expensify |

PROFESSIONAL EXPERIENCE

Career Team LLC, North Haven, CT

07/2018 - Present

Quality Assurance Director

- Oversee 8 million dollars of participant spend including work experience
- Decreased stipend variance in DC by 96%
- Recommend, develop, and review QA standards, policies, and procedures for all functions involved with or related to the quality of documentation in accordance with company standards
- Review all participant spend prior to payment to be sure all payments/reimbursements follow the guidelines set by each contract
- Reconcile Netspend accounts with QuickBooks weekly to ensure all participant payments have been recorded accurately
- Assist with government invoicing to confirm all supporting documentation meets the funding sources standards and expectations
- Review expense reports in Expensify to verify all reports have been coded to the appropriate category and class prior to reimbursing
- Establish strong working relationships with multiple teams in multiple locations across the United States
- Perform random audits, recover overpayments, conduct payouts of underpayments, and refer suspected fraud for investigation by state officials
- Train all new staff on QA standards, policies, and procedures along with expectations from each sites funding source
- Oversee all subsidized employment to make sure time is recorded accurately and dollars are spent down according to monthly and quarterly plan
- Ensure quality improvements are continuously evaluated so that tools and techniques can be modified or upgraded to make sure all data being delivered is 100% accurate and complete
- Communicate any major issues and deliver weekly status updates to Chief Financial Officer

Career Team LLC, North Haven, CT

09/2016 - Present

Payment Specialist

- Work in conjunction with DC office to pay out customer stipend/retention payments weekly
- Reviewed all payment requests for accuracy, reported any discrepancies to the Executive Director

Career Team LLC, Hartford, CT

07/2016 - 06/2018

Business Services Consultant

- Built and cultivated extensive customer book of employer contacts in order to drive client outplacement
- Worked closely with KRA and Employment Training staff to develop pool of qualified candidates to fill employer job orders
- Facilitated weekly Business Services orientation for two-to-15 participants to welcome and review the expectations from not only Business Services but the customer as well
- Worked with referred job ready customers to appropriate businesses, assisting them with lining up appropriate interviews with established employer contacts
- Maintained accurate and complete files and reports in CTHires and ETO, and prepared weekly and monthly activity reports

Career Team LLC, Hartford, CT

07/2015 - 06/2016

Online Learning Facilitator

- Earned CPRW certificate within my first year as an Online Facilitator
- Assisted customers with creating or editing resumes, cover letters, thank you notes and list of contacts
- Helped customers build their computer literacy on programs such as ProveIT, EDUtyping, and GCFLearnFree
- Guided customers through assessment tests needed to assess their computer literacy

GoToBaby, Enfield, CT

03/2009 - 10/2015

Head of Operations

- Managed contracts and relations with customers and vendors
- Oversaw purchasing, sales, customer service and design of new website
- Researched and implemented new directives for business growth
- Reviewed working practices to ascertain if it was successful and if not, devised an alternative

EDUCATION

Wentworth Institute of Technology, Boston, MA

Interior Design

Job Descriptions

TITLE:

Regional Director

REPORTS TO:

Vice President, Direct Services

LOCATION:

Regional

EMPLOYMENT TYPE:

Full-Time, Exempt Employee

Career Team is looking to hire a Regional Director that would be responsible for overseeing all appointed projects ensuring all projects are trained effectively, performing accordingly, and thriving within their communities. The primary responsibilities for this role will focus on the success of the projects within the region. This success includes but is not limited to areas around expenditure rates ensuring everything is on track, driving metrics and performance, providing support and coaching to local leadership and workforce development boards, act as a supporting liaison between program and corporate, negotiating performance metrics and creating service delivery plans for projects.

Your Impact on Career TEAM's Success:

- Ensure expense submissions from various Case Managers are in compliance with Federal TANF, local, State, and corporate policies
- Manage funds from grants to ensure records are maintained to keep the grant in budget with no disallowed costs
- Work closely with project associates and Executive Directors across projects in the United States as well as the Workforce Boards to provide financial compliance guidance and insight and participant reporting on assigned projects – this is a highly visible position
- Ensure participant expenditures are entered and processed in a timely and economic manner in accordance with established policies, budgets within contractual guidelines
- Coordinate accounting activities for assigned projects which includes establishment and monitoring of procedures and policies by contract
- Manage and monitor project participant financials and update reimbursement status for various project grants to ensure grants are fiscally managed
- Support teams across the nation with monthly project Invoices and supporting documentation and associated Quality review
- Support business development for the company as well as identify growth opportunities within the project, state, and region
- Attend workforce development conferences and meetings to promote to a Career TEAM brand ambassador within the workforce development space
- Ability to complete written forms and reports accurately and in a timely manner
- Support team(s) with audit deliverables and program audit requests
- Provide Administrative Support to teams and programs
- Supports growth and program development
- Approach each day and task with a “Zag” mindset

- Other duties and projects as needed

This position is expected to be 100% onsite. The selected candidate will be required to work onsite at the listed location.

To Qualify for This Role, You Must Have:

- Bachelor's Degree from an accredited college or university or equivalent experience
- 5+ years leadership and management experience with knowledge of TANF contracts / programs preferred
- Strong computer skills in MS Excel and Google Sheets - experience a plus
- Ability to work in a dynamic team environment - must have excellent teamwork, communication, and interpersonal skills
- Ability to work across all levels of management and staff
- Sharp attention to detail with strong organizational, analytical, research and critical thinking skills'
- Exceptional time Management skills, ability to meet accounting month end deadlines, extraordinary ability to multitask, be proactive and demonstrate an ability to work independently and in a virtual team environment
- Ability to work independently on routine tasks
- Must be able to meet deadlines and work under pressure, including the ability to perform and complete a high volume of work assignments with speed and accuracy, work cooperatively with others and showing courteousness and a high level of professionalism
- Must demonstrate the ability to always maintain confidentiality, handle personnel matters effectively, and handle employee and personnel inquiries with sensitivity, tact and diplomacy

Additional Skills/Knowledge Career TEAM Would Love for This Role:

- Master's or MBA degree
- Training in Trauma Informed Care, evidence-based practice, and/or whole family services
- Bilingual or multilingual
- Experience with training and coaching in a performance-based environment

Salary: \$/yr

Travel:

TITLE:

Project Director

REPORTS TO:

Regional Director

LOCATION:

Midlands Workforce Development Area (Fairfield, Lexington, Richland Counties, SC)

EMPLOYMENT TYPE:

Full-Time, Exempt Employee

Career Team is looking to hire a Project Director who will be responsible for overseeing an individual project, ensuring, and executing the project's overall strategic plan. In this role, the incumbent will practice working knowledge in Workforce Development protocols, which include a basic understanding of the field, core programs, and business plans. As a leader and member of the Corporate Management Team, the Project Director is accountable for ensuring quality and integrity across all workforce functions.

Your Impact on Career TEAM's Success:

- Serves as primary local contact and contract liaison funding source
- Ensure compliance with contract requirements including, the adherence to policies and procedures and program monitoring
- Focus on expenditure rates ensuring everything is on track without disallowed costs, driving metrics and performance, providing support, coaching front-line staff, and creating service delivery plans for projects
- Coordinate the planning and implementation of policies and procedures for continuous improvement and customer satisfaction
- Serve as the primary local contact and contract liaison for the funding source
- Lead high-functioning employees to execute the program initiatives while supporting employee growth
- Responsible for daily programmatic operations
- Conduct regular coaching sessions and annual performance evaluations of the team
- Approach each day and task with a "ZAG" mindset
- Other duties and projects as needed

Other Job Duties: This job description is not intended to be all-inclusive. The employee may be requested to perform other reasonable related duties as assigned by the immediate supervisor and other management as required. The company reserves the right to revise or change job duties as business requirements dictate. It is also understood that the company reserves the right to change work schedules as required.

This position is expected to be 100% onsite. The selected candidate will be required to work onsite at the listed location.

To Qualify for This Role, You Must Have:

- Bachelor's degree or higher or an equivalent combination of education and experience
- 3+ years of experience in operational leadership and management
- 3+ years of demonstrated ability working in a dynamic team environment with an aptitude for communication, interpersonal skills to work cooperatively with others, show courteousness, and having a high level of professionalism
- 2+ years of experience with computer proficiency in Microsoft Office suite and Google suite including Word, Excel, PowerPoint, Google Mail, Google Calendar, Google Docs, Google Sheets, and Google Drive
- Strong emotional intelligence and ability to lead a team with different working styles.
- A demonstrated ability to thrive in a fast-paced environment while maintaining confidentiality, handling personnel matters effectively, and handling employee and personnel inquiries with sensitivity, tact, and diplomacy
- Sharp attention to detail with exceptional organizational, analytical, research, and critical thinking skills, including the ability to perform and complete a high volume of work assignments with speed and accuracy
- Exceptional time management skills to meet deadlines and work under pressure
- Excellent verbal and written communication skills
- A Valid Driver's License

Additional Skills/Knowledge Career TEAM Would Love for This Role:

- Master's or MBA degree
- Experience and knowledge of WIOA, TANF, SNAP, and other workforce development contracts/programs
- Astounding ability to multitask and be proactive

Salary: \$/yr

Travel:

TITLE:

One Stop Operator

REPORTS TO:

Project Director

LOCATION:

Midlands Workforce Development Area (Fairfield, Lexington, Richland Counties, SC)

EMPLOYMENT TYPE:

Full-Time, Exempt Employee

Career Team is seeking a visionary, goal-driven, highly professional leader to serve as the One Stop Operator. The One Stop Operator will provide functional management, compliance, and oversight of the Workforce system while promoting the one stop system and its functions to the community. In addition, they will be responsible for promoting job search participants to the employer community and liaising with employers to obtain job leads and to identify jobs providing outreach to community partners to develop referral pipelines for all programs.

Your Impact on Career TEAM's Success:

- Responsible for overseeing the functional operations of the One-Stop Career Center services and coordinating partner services
- Developing a pipeline of referrals to ensure programs are thriving within the one stop center
- Ensure that the look and feel of the comprehensive center/partner affiliate sites and satellite sites are welcoming and accessible to all
- Work with local partners to identify potential participants for the programs
- Develop and implement strategies for operational and performance excellence
- Conduct partnership outreach and development
- Hold all WIOA required and non-required partners accountable to agreements that include but are not limited to the Memorandum of Understanding, Infrastructure Funding Agreement, and system wide commitments
- Ensure Labor Market Information, training information and the coordination with other grant sources support the WDB's demand industries
- Coordinating the service delivery of required One-Stop partners and service providers to ensure each partner contributes to the support of the One-Stop
- Establish ongoing relationships with job seekers, employers, and community partners
- Provide outreach to all parties within the community to ensure success for the one stop system
- Maintain job and employer data banks of information
- Utilize internet/social media resources to identify job trends, active sectors, and candidate employers

- Design, plan and conduct job fairs and other initiatives to enable exposure of Job Seekers to organizations with current and future job opportunities
- Identify and develop job opportunities for a diverse population of job seekers. Determine education and skill requirements and employer expectations of Job Seekers
- Establish ongoing relationships with employers. Follow-up during and after job placement activities to ensure employer satisfaction with job performance of Career Team Funding Source Job Seekers
- Prepare and present reports of activities and accomplishments
- Reporting to the WDB on operations, performance, and continuous improvement and best practice recommendations. Provides recommendations for professional development and service delivery innovations
- Evaluate the system to ensure compliance and Continuous Quality Improvement (CQI), develop, and oversee corrective action plans as appropriate
- Ensures that One-Stop System performance is on target with overall system goals; reports System activities and outcomes (i.e., referrals, results, customer feedback, staff feedback, etc.) to the funder; provides recommendations for improved outcomes
- Other duties as assigned

To Qualify for This Role, You Must Have:

- Bachelor's degree from an accredited college/university in management, organizational development, project management, business administration, or similar field is required
 - Experience in Operations, Career Services, and Recruiting considered extremely valuable
 - Lead other projects of comparable size and complexity, or experience in a comparable role with similar required skills
 - Ability to establish and maintain effective working relationships with employer representatives and Job Seekers
 - Familiarity with applicable federal, state, and local laws and regulations required
 - Ability to work in a variety of settings with culturally diverse customer bases with the ability to be culturally sensitive
 - Excellent interpersonal skills with the ability to effectively engage a diverse audience in verbal and written format required
 - Ability to work independently with minimal supervision and effectively as part of a team
- **Additional Skills/Knowledge Career TEAM Would Love for This Role:**
 - Knowledgeable about WIOA and other local workforce services as well as relevant partners
 - Experience with training and coaching in a performance-based environment
 - Bilingual or multilingual
 - Certified Workforce Development Professionals (CWDP) certificate

Salary: \$/yr

Salary is commensurate with education and experience. Career TEAM offers a competitive benefits package including healthcare, dental, and personal/vacation time

Travel:

TITLE:

Area Manager

REPORTS TO:

Project Director

LOCATION:

Midlands Workforce Development Area (Fairfield, Lexington, Richland Counties, SC)

EMPLOYMENT TYPE:

Full-Time, Non-Exempt Employee

Career Team is looking to hire an Program Manager who will be responsible for all coordination of assigned programs and management of services within those programs. Responsible for the implementation of Policies and Procedures. Manage and conduct analysis of workforce activities to evaluate compliance with policies and procedures and adherence to contract requirements. This role will be performed under the Project Director.

Your Impact on Career TEAM's Success:

- Responsible for the planning and implementation of a quality management model for continuous improvement and customer satisfaction
- Manage and lead project staff to meet or exceed performance goals, including ensuring that staff members perform thorough, accurate review of all case files, that staff have no disallowed costs with eligibility
- Ensures appropriate action is followed to correct deficiencies
- Identify community partnerships, collaborate with other professionals and maintain partner relationships
- Welcomes and addresses customer complaints as they occur, fairly and with good customer service as a guide, and consistently with no more than five valid complaints per review period and no more than two valid complaints on one individual employee
- Ensures that the Center is appropriately engaging industry sectors to meet/exceed customer expectations
- Evaluates and understands all performance goals at the beginning of each Program year to effectively impact each performance measure, establishes procedures to ensure all staff are following all prescribed strategies to impact the performance measures
- Develops and maintains effective teamwork strategies
- Identifies and addresses needs for staff training
- Direct, control, and supervise the work activity of project staff, identify and fill open positions in a timely manner, hire and promote employees based on sound decision making ability, evaluate and recommend personnel actions fairly and quickly, deliver timely coaching and conduct employee evaluations when scheduled
- Utilize and model Extreme Customer Service behaviors in all interactions with internal and external customers
- Approach each day and task with a "ZAG" mindset
- Other duties and projects as needed

Other Job Duties: This job description is not intended to be all-inclusive. The employee may be requested to perform other reasonable related duties as assigned by the immediate supervisor and other management as required. The company reserves the right to revise or change job duties as business requirements dictate. It is also understood that the company reserves the right to change work schedules as required.

This position is expected to be 100% onsite. The selected candidate will be required to work onsite at the listed location.

To Qualify for This Role, You Must Have:

- A Bachelor's Degree in Business Administration, Psychology, Social Services or a related field or equivalent experience with 2-4 years of proven management skills
- Minimum of five years of supervisory or management experience.
- Preferred knowledge of the workforce development program operations and development.
- Strong business knowledge of customer service best practices and performance management. Experience in training and coaching/mentoring.
- Requires top level project management, organizational, personnel, problem solving and data analysis skills, along with an ability to interact with employees at all levels.
- Excellent interpersonal skills and both written and oral communications skills.
- Need strong technical skills, proficiency in Microsoft Office and a commitment to accountability in a continually improving quality environment.
- Must have a valid driver's license and adequate vehicle insurance coverage.

Additional Skills/Knowledge Career TEAM Would Love for This Role:

- Strong computer skills in MS Excel and Google Sheets
- Experience and knowledge of workforce development contracts/programs
- Astounding ability to multitask and be proactive

Salary: \$/yr

Travel:

TITLE:

Business Services Associate

REPORTS TO:

Program Manager

LOCATION:

Midlands Workforce Development Area (Fairfield, Lexington, Richland Counties, SC)

EMPLOYMENT TYPE:

Full-Time, Exempt Employee

Career Team is looking to hire a Business Services Representative who will be responsible for promoting job search participants to the employer community and liaising with employers to obtain job leads and identify jobs.

Your Impact on Career TEAM's Success:

- Identify and develop job opportunities for a diverse population of Job Seekers
- Determine education and skill requirements and employer expectations of Job Seekers
- Interview Job Seekers referred by Career Team staff for job placement to determine skills, abilities, and job goals
- Match Job Seekers with job openings and refer to employing organizations for interview.
- Establish ongoing relationship with Job Seekers while enhancing community awareness of and engagement with available services and resources at the OhioMeansJobs centers.
- Establish ongoing relationship with employers. Follow-up during and after job placement activities to ensure employer satisfaction
- Request additional and/or targeted support activities as needed
- Maintain job and employer data banks of information
- Maintain client records related to job development and placement activities
- Maintain employer records related to job opportunities, placement activities and participant job retention
- Utilize internet/social media resources to identify job trends, active sectors, and candidate employers
- Prepare and present reports of activities and accomplishments
- Design, plan and conduct job fairs and other initiatives to enable exposure of Job Seekers to organizations with current and future job opportunities
- Other duties as assigned

This position is expected to be 100% onsite. The selected candidate will be required to work onsite at the listed location.

To Qualify for This Role, You Must Have:

- Associate degree required or comparable experience
- Ability to establish and maintain effective working relationships with employer representatives and Job Seekers
- Experience in Career Services and Recruiting considered extremely valuable
- Prefer experience with training and coaching in a performance-based environment
- Prefer working knowledge of WIOA and all applicable local Workforce Service programs
- Familiarity with applicable federal, state, and local laws and regulations required
- Ability to work in a variety of settings with culturally diverse customer bases with the ability to be culturally sensitive.
- Excellent interpersonal skills with the ability to effectively engage a diverse audience in verbal and written format required
- Ability to work independently with minimal supervision and effectively as part of a team
- Exceptional time management skills to meet deadlines and work under pressure

Additional Skills/Knowledge Career TEAM Would Love for This Role:

- Bachelor's degree
- Knowledgeable about the local region and relevant partners
- Bilingual or multilingual

Salary: \$/yr

Salary is commensurate with education and experience. Career TEAM offers a competitive benefits package including healthcare, dental, and personal/vacation time

Travel:

TITLE:

Facilitator

REPORTS TO:

Project Director

LOCATION:

Midlands Workforce Development Area (Fairfield, Lexington, Richland Counties, SC)

EMPLOYMENT TYPE:

Full-Time, Exempt Employee

Career Team is looking to hire a facilitator who will plan and coordinate activities to support instructional programs and provide tutorial services to Job Seekers.

Your Impact on Career TEAM's Success:

- Manages various software applications and content on-site and virtually
- Establishes, maintains, and promotes a classroom atmosphere that ensures the emotional and physical safety of clients and emphasizes mutual respect, self-worth, self-discipline, cooperation, consideration, and responsibility
- Creates workshop materials to address the needs of participants and community partners
- Deliver presentations both in-person and virtually
- Responsible for creating workshop schedules and inviting partners to present (based on the needs of participants)
- Ability to learn and present Career Edge to the community and partners
- Serves as a client advocate to provide direction and support by creating and monitoring processes that will ensure client success in the online environment
- Works with community partners and Career Advisors to coordinate any testing that is mandated by the course or by the program (following up with ordering, scheduling, and administering of all tests)
- Provides an orientation for all first-time clients so that they understand the expectations of the program and the site
- Participates and leads virtual open houses that are trainer-driven
- Takes responsibility for assisting clients who take instruction in a lab setting at the site
- Complete all required reports
- Serves as liaison for the client in dealing with concerns and issues about courses and trainers
- Assists with recruiting participants for the program, Career Edge, and workshops
- Provides follow-up services to participants who have completed the program

This position is expected to be 100% onsite. The selected candidate will be required to work onsite at the listed location.

To Qualify for This Role, You Must Have:

- Associate's degree or higher or an equivalent combination of education and experience in training
- Strong communication skills and knowledge about community resources
- Must be computer literate and have MS Word and Excel skills at minimum, and the ability to learn specialized databases and software systems
- Ability to work in a variety of settings with a culturally diverse customer base with the ability to be culturally sensitive
- Ability to serve as a role model to customers and motivate them towards achieving goals
- Ability to meet and/or exceed set goals and objectives
- Excellent interpersonal, time management, customer service, organizational skills, and communication skills, both oral and written required
- Knowledgeable about the WIOA program and other workforce program requirements
- A demonstrated ability to thrive in a fast-paced environment while remaining flexible, proactive, resourceful, and efficient in maintaining a high level of confidentiality
- Exceptional time management skills to meet deadlines and work under pressure
- A Valid Driver's License

Additional Skills/Knowledge Career TEAM Would Love for This Role:

- Bachelor's degree
- Knowledgeable about the local region and relevant partners
- Bilingual or multilingual

Salary: \$/yr

Salary is commensurate with education and experience. Career TEAM offers a competitive benefits package including healthcare, dental, and personal/vacation time

Travel:

TITLE:

Eligibility and Enrollment Specialist

REPORTS TO:

Program Manager

LOCATION:

Midlands Workforce Development Area (Fairfield, Lexington, Richland Counties, SC)

EMPLOYMENT TYPE:

Full-Time, Exempt Employee

Career Team is looking to hire an Eligibility and Enrollment Specialist to provide professional eligibility and enrollment services to individuals served under this contract. This role will be performed under the Program Manager.

Your Impact on Career TEAM's Success:

- Provide virtual follow-up services to designated former participants of the Workforce One-Stop system to ensure employment success and retention
- Engage unemployed follow-up customers in a job search plan/activities as needed to obtain immediate and appropriate employment
- Engage customers who are at risk of job loss in retention and/or employment search activities
- Provide referrals as needed to support customer's retention needs
- Work to re-engage and re-establish contact with non-responsive customers
- Research and obtain documentation to verify post-participation employment status
- Implement policies applicable to Follow-Up frequency requirements
- Document Follow-Up activities and efforts in case notes within the state's case management system
- Enter post program employment and educational information into the state's case management system
- Follow all policies, procedures and regulations related to follow-up, including ensuring that case files have verification documents used for entry of post-program outcomes
- Meet and/or exceed program benchmarks. Participate in all staff related events as required including but not limited to training, staff meetings and individual supervision
- Under the direction of the Performance Analyst, provide targeted outreach / research to identify and document employment/educational status of designated post program customers
- Complete all required reports
- Approach each day and task with a "ZAG" mindset
- Other duties and projects as needed

This position is expected to be 100% onsite. The selected candidate will be required to work onsite at the listed location and within the community.

To Qualify for This Role, You Must Have:

- Bachelor's degree or higher or an equivalent combination of education and experience
- Must possess the ability to establish and maintain a positive/productive virtual relationship with both former job seeker customers and their employers.
- Ability to work in a variety of settings with culturally diverse customer base with the ability to be culturally sensitive
- Strong organizational skills to juggle multiple tasks in a performance oriented environment
- Ability to serve as a role model to customers and motivate them towards achieving goals
- Proficient in Microsoft Office applications (Word, Excel, Outlook) and Google Suite
- Ability to work independently and effectively as part of a team
- Exceptional time management skills to meet deadlines and work under pressure
- Excellent verbal and written communication skills
- A Valid Driver's License

Additional Skills/Knowledge Career TEAM Would Love for This Role:

- Bilingual or Multilingual
- Strong multitasking abilities and proactive approach to tasks
- Training in Trauma Informed Care, evidence-based practice, and/or whole family services

Salary: \$/yr

Salary is commensurate with education and experience. Career TEAM offers a competitive benefits package including healthcare, dental, and personal/vacation time

Travel:

TITLE:

Career Advisor Adult/Dislocated Worker

REPORTS TO:

Project Director

LOCATION:

Midlands Workforce Development Area (Fairfield, Lexington, Richland Counties, SC)

EMPLOYMENT TYPE:

Full-Time, Exempt Employee

Career Team is looking to hire a Career Advisor who will perform professional work providing career counseling, intensive case management, and follow-up services. Work is performed under the supervision of the Project Director.

Your Impact on Career TEAM's Success:

- Provide information and case management services to the community
- Complete intake and eligibility determination for the workforce program
- Assess jobseekers' employment, abilities, and training needs through interviewing, testing, and other methods
- Serves as a liaison between workforce development programs and community partners
- Enter data into and otherwise use and process clients through any participant information system as required
- Guide job seekers through the preparation of individual employment plans (IEP) based on their specific occupational goals
- Stay on top of labor market trends and best practices
- Counsel clients on available job opportunities, training programs, and other services
- Refer individuals to appropriate services, training programs, or job opportunities and follow up on those activities
- Conduct orientation sessions, workshops, job clubs, and other group presentations for clients
- Follow all policies, procedures, and regulations related to eligibility documentation
- Maintain accurate individual case files for each registered customer assuring that each file contains all required eligibility documents and meets compliance requirements
- Meet and/or exceed program benchmarks. Participate in all staff-related events as required including but not limited to training, staff meetings, and individual supervision
- Complete all required reports within the data management system

This position is expected to be 100% onsite. The selected candidate will be required to work onsite at the listed location.

To Qualify for This Role, You Must Have:

- Bachelor's degree or higher or an equivalent combination of education and experience
- Strong communication skills and knowledge about community resources
- Possess strong analytical and problem-solving skills, with the ability to make well-thought-out decisions
- Must be computer literate and have MS Word and Excel skills at minimum, and the ability to learn specialized databases and software systems
- Ability to work in a variety of settings with a culturally diverse customer base with the ability to be culturally sensitive
- Ability to serve as a role model to customers and motivate them towards achieving goals
- Ability to meet and exceed set goals and objectives
- Excellent interpersonal, time management, customer service, organizational skills, and communication skills, both oral and written required
- Knowledgeable about the WIOA program and other workforce program requirements
- A demonstrated ability to thrive in a fast-paced environment while remaining flexible, proactive, resourceful, and efficient in maintaining a high level of confidentiality
- Exceptional time management skills to meet deadlines and work under pressure
- A Valid Driver's License

Additional Skills/Knowledge Career TEAM Would Love for This Role:

- Master's or MBA degree
- Knowledgeable about the local region and relevant partners
- Bilingual or multilingual

Salary: \$/yr

Salary is commensurate with education and experience. Career TEAM offers a competitive benefits package including healthcare, dental, and personal/vacation time

Travel:

TITLE:

Youth Career Advisor

REPORTS TO:

Project Director

LOCATION:

Midlands Workforce Development Area (Fairfield, Lexington, Richland Counties, SC)

EMPLOYMENT TYPE:

Full-Time, Exempt Employee

Career Team is looking to hire a Youth Career Advisor who will perform professional work providing career counseling, intensive case management, and follow-up services to young adults eligible for the WIOA program. Work is performed under the supervision of the Project Director .

Your Impact on Career TEAM's Success:

- Provide information and case management services to community members interested in WIOA Youth services
- Complete intake and eligibility determination for workforce programs
- Assess job seekers' employment, abilities, and training needs through interviewing, testing, and other methods
- Serve as a liaison between workforce development programs and community partners and resources
- Offer all youth participants the required 14 Youth Program Elements as part of your case management
- Create and foster relationships with area juvenile justice centers and school districts
- Enter data into state system and process clients through any participant information system as required
- Guide job seekers through the preparation of individual employment plans (IEP) based on their specific occupational or education goals
- Stay on top of labor market trends and best practices in career and training paths
- Counsel clients on available job and education opportunities, training programs, and other services
- Refer individuals to appropriate services, training programs, or job opportunities and follow up on those activities
- Conduct orientation sessions, workshops, job clubs, and other group presentations for clients
- Follow all policies, procedures, and regulations related to eligibility documentation
- Maintain accurate individual case files in state system for each registered customer ensuring that each file contains all required eligibility documents and meets compliance requirements

- Meet and/or exceed program benchmarks. Participate in all staff-related events as required including but not limited to training, staff meetings, and individual supervision
- Complete all required reports within the data management system

This position is expected to be 100% onsite. The selected candidate will be required to work onsite at the listed location and within the community.

To Qualify for This Role, You Must Have:

- Bachelor's degree or higher or an equivalent combination of education and experience
- Strong communication skills and knowledge about community resources
- Possess strong analytical and problem-solving skills, with the ability to make well-thought-out decisions
- Must be computer literate and have MS Word and Excel skills at minimum, and the ability to learn specialized databases and software systems
- Ability to work in a variety of settings with a culturally diverse customer base with the ability to be culturally sensitive
- Ability to serve as a role model to customers and motivate them towards achieving goals
- Ability to meet and exceed set goals and objectives
- Excellent interpersonal, time management, customer service, organizational skills, and communication skills, both oral and written required
- Knowledgeable about the WIOA program and other workforce program requirements
- A demonstrated ability to thrive in a fast-paced environment while remaining flexible, proactive, resourceful, and efficient in maintaining a high level of confidentiality
- Exceptional time management skills to meet deadlines and work under pressure
- A Valid Driver's License

Additional Skills/Knowledge Career TEAM Would Love for This Role:

- Bilingual or Multilingual
- Strong multitasking abilities and proactive approach to tasks
- Training in Trauma Informed Care, evidence-based practice, and/or whole family services

Salary: \$/yr

Travel:

TITLE:

Quality Assurance Specialist

REPORTS TO:

Project Director

LOCATION:

Midlands Workforce Development Area (Fairfield, Lexington, Richland Counties, SC)

EMPLOYMENT TYPE:

Full-Time, Non-Exempt Employee

Career Team is looking to hire a Quality Assurance Specialist to support program development and quality assurance functions across the project. This role will play an integral part in serving our customers by supporting the program behind the scenes. The day-to-day functions of this role will include reporting, data collection, monitoring, etc.

Your Impact on Career TEAM's Success:

- Manage all activity for tracking data and training staff to be compliant
- Ensure that Career Advisors will maintain accurate written case records and files that are necessary to meet contractual requirements
- Provide internal monitoring and oversight of all program activities and requirements
- Support the invoicing relationship between the funder and the corporate fiscal team,
- Provide updates, corrections, reviews, and documentation in a timely matter
- Monitor, audit, and provide second reviews on files and reports
- Will be a subject matter expert in program compliance and policy from all levels
- Will maintain a positive productive relationship with the funder to ensure partnership and coordination
- Complete program invoice corrections in a timely manner
- Comply with all terms and conditions of a subaward agreement (i.e., contract) for the delivery of services
- Work with the fund source compliance coordinator to proactively address corrections
- Work with staff to ensure correct documents and case notes are entered into a database for all services provided to customers
- Work with the leadership team to process participant exits from database to hard file
- Assist team with compliance reports
- Data entry of expenditures for all program functions
- Provide administrative support to teams and program
- Accurately keep updated records
- Approach each day and task with a "ZAG" mindset
- Other duties and projects as needed

This position is expected to be 100% onsite. The selected candidate will be required to work onsite at the listed location.

To Qualify for This Role, You Must Have:

- Bachelor's degree or higher or an equivalent combination of education and experience
- Ability to work in a dynamic team environment - must have excellent teamwork and interpersonal skills
- Ability to work across all levels of management and staff
- Sharp attention to detail with strong organizational, analytical, research, and critical thinking skills
- Ability to work independently and in a virtual team environment showing courteousness and a high level of professionalism
- Exceptional time management skills to meet deadlines and work under pressure to complete a high volume of work assignments with speed and accuracy
- Excellent verbal and written communication skills
- A Valid Driver's License

Additional Skills/Knowledge Career TEAM Would Love for This Role:

- Master's or MBA degree
- Strong computer skills in MS Excel and Google Sheets
- Experience and knowledge of WIOA workforce development contracts/programs
- Astounding ability to multitask and be proactive

Salary: \$/yr

Salary is commensurate with education and experience. Career TEAM offers a competitive benefits package including healthcare, dental, and personal/vacation time

Travel:

TITLE:

Project Accountant

REPORTS TO:

Project Director

LOCATION:

Midlands Workforce Development Area (Fairfield, Lexington, Richland Counties, SC)

EMPLOYMENT TYPE:

Full-Time, Exempt Employee

Career Team is looking to hire a Project Accountant who is responsible for all financial activities within the project. The primary responsibilities for this role will focus on invoicing, analyzing, and reporting project financial status for the project. The ideal candidate must have the ability to interact with co-workers and customers at all levels. An ideal candidate would thrive in a fast-paced environment while remaining flexible, proactive, resourceful, and efficient. The Project Accountant must be able to maintain a high level of accuracy and confidentiality. Work is performed under the supervision of the Project Director

Your Impact on Career TEAM's Success:

- Ensures that procedures and policies are in place to facilitate effective and efficient financial reporting and ensure compliance with Federal, local, State, and corporate policies
- Directs fiscal operations relating to financial planning, funds management, accounting, and reporting
- Prepare and maintain project budgets, forecasts, and working capital requirements
- Works closely with senior company leadership, project director, staff, as well as the Workforce Board to provide financial insight and reporting on the performance of assigned projects
- Ensure that the project fulfills all financial obligations in a timely and economic manner in accordance with established policies, budgets within funding guidelines
- Ability to coordinate accounting activities for assigned projects which includes establishment and monitoring of procedures and policies by contract.
- Process employee expenses, participant expenses, vendor invoices/program payroll analytics
- Prepares monthly project advance requests, Invoices, and supporting documentation and works with Workforce Boards on any inquiries to ensure timely payment
- Performs month-end closing activities including Balance Sheet reconciliations
- Perform Financial Reporting including budgets, forecasts, and associated comparisons
- Supports annual audit deliverables and manages periodic program audit requests
- Approach each day and task with a "ZAG" mindset
- Other duties and projects as needed

This position is expected to be 100% onsite. The selected candidate will be required to work onsite at the listed location.

To Qualify for This Role, You Must Have:

- Bachelor's degree or higher in accounting, Business finance, or related field or an equivalent combination of education and experience with 5+ years of accounting experience (Preferred)
- Must have demonstrated Knowledge of Generally Accepted Accounting Principles (GAAP), be able to reconcile balance sheets and profit/loss reports, and implement financial management policies and procedures
- Experience with budgeting and forecasts across multiple funding streams and communicating the contract's financial position
- Advanced computer skills in MS Excel and Accounting Software - Quick Books, Adaptive Workday and Expensify experience a plus
- Ability to work in a dynamic team environment - must have excellent teamwork, communication, and interpersonal skills
- Ability to work across all levels of management and staff
- Detail-oriented with strong organizational, analytical, research, and problem-solving skills
- Ability to meet Accounting month end deadlines, be proactive, and demonstrate an ability to work independently and in a virtual team environment
- Must possess integrity and be able to maintain confidentiality

Additional Skills/Knowledge Career TEAM Would Love for This Role:

- Master's or MBA degree

Salary: \$/yr

Travel:

Letter of Support

April 13, 2026

To Whom It May Concern,

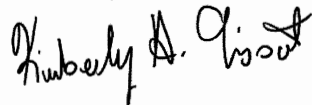
Able South Carolina is pleased to support Career Team's proposal in response to RFP No. MWDB 25-01, *Workforce Innovation and Opportunity Act Adult, Dislocated Worker, Youth Programs and One-Stop Operator Request for Proposals*.

If selected, we would welcome the opportunity to work with Career Team in support of the programs and services outlined in the RFP. This may include coordination, referrals, resource sharing, employer or community connections, and other collaborative efforts that help strengthen workforce outcomes in the Midlands region.

We would be pleased to explore ways our organizations can work together to support participants, employers, and the broader community under this initiative.

Please feel free to contact me directly if you need any additional information.

Sincerely,



Kimberly Tissot
President and CEO
Able SC
803-233-2988
ktissot@able-sc.org

Procurement Policy

PROCUREMENT AND CONTRACTING POLICY

1. Career TEAM complies with federally established standards for procurement and contracting to obtain goods and services in a cost effective manner and to promote open and fair competition for prospective providers.
2. Career TEAM operates field sites across the nation. The procurement and contracting policy may be adjusted to comply with requirements specific to that site. In certain circumstances the corporate office may conduct a procurement relevant to multiple sites that will result in more economical purchases and less administrative burden for field sites. To the extent possible and appropriate, Career TEAM will attempt to use local contractors or vendors.
3. To the extent possible and appropriate, Career TEAM will use existing and/or enter into State and local intergovernmental agreements for procurement or use of common goods and services. To the extent possible, Career TEAM will use vendors from existing and approved vendor lists relevant to the awarding agency or prequalified by Career TEAM.
4. Career TEAM will make awards to responsible contractors that hold the capacity to perform services under the terms and conditions of the relevant procurement. Career TEAM will consider such factors as contractor integrity, compliance with public policy, record of past performance, financial stability, and technical resources.
5. Career TEAM will use time and material type contracts in situations in which no other contract is suitable, and if the contract includes a ceiling prices that the contractor exceeds its own risk.
6. To the extent possible and appropriate, Career TEAM will use value engineering clauses in any contracts for construction projects of a sufficient size to offer reasonable opportunities for cost reductions.
7. To the extent possible and appropriate, Career TEAM will use Federal excess/surplus property in lieu of purchasing new equipment and/or property.

CODE OF CONDUCT STANDARDS

1. Career TEAM is committed to State and Federal compliance for the purchase and administration of good and services. As such Career TEAM agrees to the following:
 - a. Career TEAM will not allow any director, officer, employee or volunteer participate in the selection, award or administration of any bid or contract supported by State or Federal funds if a conflict of interest is apparent. Conflicts of interest include:
 - i. Any director, officer, employee or volunteer having a financial, family or any other beneficial interest in the vendor selected or considered for an award.

- ii. Any director, officer, employee or volunteer showing favoritism toward a member of his/her family, spouse's family or any company or vendor who either employs or has an any relationship with a family member through the bid, award or submission process which violates the intent of State, Federal or local procurement laws and policies created to support open competitive bid submission
- b. None of Career TEAM's directors, officers, employees or volunteers shall accept or solicit gratuities, gifts, consulting fees, trips, favors or anything having monetary value in excess of twenty dollars (\$20) from a vendor, contractor, bidder, potential vendor, potential contractor, potential bidder or from any family member or employee of the for mentioned parties
- c. Career TEAM shall pursue appropriate legal, administrative or disciplinary action against any director, officer, employee, volunteer, vendor, contractor or bidder or their employees has allegedly committed or has been convicted of or pled no contest to a procurement violation. If the person is a Career TEAM employee or volunteer he/she shall be immediately removed from any further involvement with or responsibility for procurement actions, bid submissions, or grants management pending investigation.

GENERAL COST STANDARDS

- 1. Career TEAM will adhere to the following over-arching governance when purchasing goods or administering services:
 - a. All Federal, State and local laws, regulations and guidelines are followed in detail.
 - b. Ensure contractors and vendors perform or deliver in accordance with the terms, conditions and specifications of their contract, purchase order or service agreement.
 - i. Both quality and price are factors that will govern selection.
 - c. Maintain a transparent process for selecting goods and services.
 - d. Encourage qualified organizations to apply by maintaining an adequate list of potential vendors and contractors, encouraging them to request inclusion in the bidders list.
 - e. Competition will not be restricted by placing unreasonable requirements on vendors or contractors to qualify them to do business with Career TEAM.

BUY AMERICAN

- 1. Career TEAM will comply with the Buy American Act and place a purchasing preference on products made in the United States.

AUTHORITY TO TAKE PROCUREMENT ACTIONS

1. The Chief Executive Officer and the Procurement Officer will have the capacity to approve formal solicitations, contracts, contract modifications and terminations.
2. The Chief Administrative Officer and/or the Chief Operating Officer will serve as Career TEAM's primary Procurement Officer. Under certain circumstances, these individuals may designate another individual to assist with responsibilities relevant to the Procurement Officer.
3. The Career TEAM Chief Executive Officer holds the authority to designate the employee who will serve as the Procurement Officer. The Chief Executive Officer may change the Procurement Officer at any time and without notice.

PROCUREMENT DOCUMENTATION

1. Career TEAM shall maintain accurate procurement and contract documentation to verify each procurement, monitor implementation and appropriate closeout of each contract.

PROCUREMENT LEVELS BY FUNDING EXPENDITURE

1. Micro Purchases for goods and services \$10,000 or less: Procurement within this threshold is the acquisition of supplies or services. Micro-purchases must be distributed equitably among qualified suppliers. Micro-purchases may be awarded without soliciting competitive quotations the price is considers the price to be reasonable as defined in 2 OMB 200.
2. Small Purchases for goods and services \$10,001 to \$250,000: Procurements within this threshold, small purchases procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the Simplified Acquisition Threshold (\$250,000). Written procedural guidance must ensure documentation of price or rate quotes, procurement method and justification for the selection from among an adequate number of competitive providers.
 - a. Career TEAM uses simple and informal procurement procedures for the small purchases of goods and services. Career TEAM personnel secure price or rate quotations from an adequate number of qualified sources. The simple and informal procurement procedures to make small purchases involves steps such as:
 - i. Confirmation of a supply or service need (informs the scope of work)
 - ii. Confirmation that funds exist to make the small purchase
 - iii. Confirmation that other awarding agency requirements have been satisfied (e.g., some states require written approval of property and equipment purchases over a certain amount)

- iv. Development of an appropriate scope of work, terms and conditions (including any references to renewals or second year costs) that represents fair and reasonable requirements from multiple, qualified sources
 - v. Approval from the Procurement Officer of the scope of work, terms and conditions as well as authorization to use of small purchase procurement procedures
 - vi. Internal communication between corporate leaders and site leaders regarding intent to make a small purchase and proposed payment methodology
 - vii. External communications to request quotation from two or more suppliers or providers of relevant goods or services (may include use of any pre-approved provider lists)
 - viii. Documentation of quotation by potential suppliers or providers
 - ix. Review of quotations, due diligence clarification as warranted and selection of potential supplier or provider based on reasonableness of cost (i.e., competitive range) and other relevant factors (e.g., local purchase preferences)
 - x. Notification of intent to contract (or not) with potential supplier or providers
 - xi. Completion of procurement closeout
 - xii. Completion of contract or service agreement
 - xiii. Completion of purchase transaction
 - xiv. Completion of appropriate documentation (e.g., copy of receipt sent to fiscal)
 - xv. Confirmation of receipt of goods or services; documentation of any issues (for future reference)
 - xvi. Review of financial reports to confirm appropriate posting of transaction
- b. A Career TEAM site leader or a corporate leader may initiate a small purchase procurement process. A Career TEAM procurement officer must authorize the use of the small purchase procurement process and may provide assistance with the process to maintain the integrity of the procurement process.
 - c. Career TEAM will adopt the local board procurement policy when required.
3. Purchases for goods and services at or above the Simplified Acquisition Threshold of \$250,000: Procurement at this threshold level are subject to formal bid/proposal solicitation requirements. See request for proposal section of this document.

PRICE ANALYSIS

1. Career TEAM will perform a price analysis appropriate to each procurement method. Price analysis is the process of examining and evaluating a price without looking at the cost elements. This involves: comparison of competitive price quotations, appropriate comparison of historical or current prices for similar items which have been competitively procured or formally determined as reasonable based on price, appropriate use of measures to point out differences such as price per training hour or price of a deliverable, and/or published price lists.

COST ANALYSIS

1. Career TEAM will perform a cost analysis appropriate to each procurement method and relevant to contract modifications, subcontracts, and multiple year contracts. In addition to the program description, cost analysis reveals the applicant's understanding of the services to be provided and their commitment of the resources to get the work done. It is separate from program analysis.
2. Cost analysis consists of the following elements for consideration:
 - a. Independent Estimates: The method and degree of analysis depends on the facts surrounding the particular procurement and pricing situation. Career TEAM will make an independent estimate of the cost of the project before receiving proposals. The estimate may be based on past experience, costs of similar projects in other organizations, and other sources. Estimates may be developed in the form of acceptable ranges for price and cost elements. The estimate provides a yardstick for the comparison of the costs of the applicant.
 - b. Review and evaluation of each element of the proposed line item budget. Reviewers may evaluate costs by:
 - i. Judging whether costs are necessary and reasonable and sufficient to achieve the goals and deliverables in the project.
 - ii. Evaluating the cost trends on the basis of current or historical cost data.
 - iii. Conducting an appraisal of the estimated components such as labor and materials.
 - iv. Evaluating negotiated or federally approved indirect cost rates.
 - v. Comparing proposed costs with any other available data, including other proposals.
 - vi. Verifying that the proposed costs are in accordance with applicable cost limitations if there are any limitations specified in the procurement and do not violate laws, regulations and policy and solicitation requirements and restrictions.

NONCOMPETITIVE PROCUREMENT

1. Noncompetitive occurs when one vendor is asked to submit a proposal (sole source) or after solicitation of a number of sources, competition is determined inadequate (failed procurement). Procurement by noncompetitive means may be used only when the award of a contract is infeasible under small purchase procedures or formal competition and when one of the following circumstances applies:
 - a. The item is available only from a single source;
 - b. The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;
 - c. The awarding agency authorizes noncompetitive proposals; or
 - d. After solicitation of a number of sources, competition is determined to be a failed competition, where the solicitation has resulted in fewer than two responsive and responsible bids.

REQUEST FOR QUALIFICATIONS

1. Career TEAM may use a request for qualifications to develop lists of acceptable suppliers.
2. Career TEAM will issue a solicitation that describes relevant information such as the overall program goals, objectives and standards, the purpose of the services, what services are procured and, if applicable, the target groups the program will serve as well as any other requirements necessary to assess the supplier.
3. Career TEAM will review the submissions and identify qualified respondents based on factors such as pricing, experience, technical qualifications and capacity.
4. Career TEAM will inform respondents of their status relevant to the pre-qualified list.
5. Career TEAM will update any pre-qualified vendor list at least every two years.
6. The process of choosing an individual training account (ITA) provider represents an exception to the RFQ process.

PROCUREMENT BY SEALED BID

1. Career TEAM reserves the right to use a sealed bid process to publicly solicit a firm-fixed-price contract that conforms to all the material terms and conditions of the invitation to bid and offers the lowest price.
2. Career TEAM will use a sealed bid process when:
 - a. A complete, adequate, and realistic specification or purchase description exists.

- b. At least two responsible bidders are willing and able to compete effectively and for the business.
 - c. The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of cost.
3. Career TEAM uses the following process for a sealed bid procurement:
- a. Develop bid specifications
 - b. Confirm specifications align with conditions relevant to using a sealed bid process
 - c. Identify a sufficient time period for response
 - d. Organize all relevant information to develop a formal bid request
 - e. Publicly advertise the bid
 - f. Open bids publicly at the time and place identified in the invitation
 - g. Negotiate with the bidder offering the lowest bid that conforms to the specifications
 - h. Execute a contract
 - i. Monitor the contract performance
4. Career TEAM reserves the right to reject all bids provided a sound and documentable reason exists.

REQUEST FOR PROPOSALS (RFP)

1. Process for Soliciting Proposals: A list of potential vendors will be assembled by searching all reasonable sources for organizations and/or individuals that do similar work. A notice of the availability of funds will be distributed through email and/or the US Postal Service to the list of potential vendors. A bidder's conference and letter of intent are encouraged, but not required.
2. Process for Accepting Proposals: Incoming proposals will be logged and date and time stamped. The log will contain the name of the applicant, the date and time the proposal was received, and the name and signature of the person accepting the proposal. The log should not be visible to applicants who hand deliver their proposals. The names and the number of applicants are confidential until the solicitation process has been completed.
 - a. If proposals are late and it has been specified in the solicitation that late submissions will not be accepted, the proposals should be logged and returned to the applicant with a statement that the requirements of the solicitation were not met.

- b. Proposals should be opened and the content of proposals reviewed at a specified time and place to determine if the proposal was complete. A checklist will be developed to review proposals for completeness. All proposers should be treated equally. If one proposal is rejected for incompleteness, then all other proposals which were not complete must be rejected. All applications that meet the submission criteria must be considered.
3. The RFP will include:
- a. Project Overview: eligible applicants, funding source and authorization, provider and Career TEAM responsibilities, overall program goals, objectives and standards, the purpose of the contract, what services are procured and, if applicable, the target groups the program will serve.
 - b. Statement of Work: the scope of work; the materials necessary to complete the work and the services to be procured and the time, place and methods for performance of services.
 - c. Basis for award decisions: factors that will be used to evaluate the proposal and the relative importance of the factors and a description of how price or cost will be utilized as a factor affecting proposal awards decisions.
 - d. Applicant Administrative Requirements: requirements for maintenance of program and participant records; fiscal management and reporting; program status records and reports; allowability of subcontracting; grievance procedures; and acceptance of the terms of the contract terms and conditions.
 - e. The contract terms and conditions may be included in the RFP package or the RFP may include a statement that the contract conditions are available for review at Career TEAM.
 - f. Submission Requirements: proposal format; the number of copies to submit; the location where the proposal should be submitted and the submission closure time and date and any other minimum responsiveness requirements that must be met for a proposal to be considered.
 - g. Statement of Career TEAM Rights: including but not limited to the statement that Career TEAM reserves the right to reject any or all proposals.
 - h. Statement of the proposer's rights of protest and appeal: the name of the individual with whom the protest must be filed, the time limits for the filing of the protest, the procedure the handling of protests, who makes the decision and appeal, or not, to a higher authority.
 - i. Proposal Content: the questions that the applicant must answer in order to explain how and why they should be awarded the contract. This should require sufficient

detail to allow the reviewers to rate the proposal and should include organizational capability and past performance.

- j. Budget instructions and forms.
 - k. Forms: a summary or cover sheet and any other forms that the applicant must submit.
4. Budgets: Applicants must submit a full line-item budget which identifies the basis for all costs by cost category and explains the basis for each cost, even if the contract will be a fixed-price contract. Cost guidelines include:
- a. Administration: Except for awards that are solely for the performance of administrative functions, all costs incurred for functions and activities of subrecipients and vendors are program costs.
 - b. Certification: Each applicant must certify that to the best of its knowledge and belief, the cost data is accurate, complete, and current at the time of agreement on price.
 - c. Indirect costs: Career TEAM may permit applicants to include indirect costs if they have a federally-approved rate.
 - d. Program Income: Non-profit organizations must reprogram program income to support the program.

PROGRAM REVIEW

- 1. Evaluation Criteria: Factors for rating proposals, whether numerical or qualitative, must be weighted by total points. The relative weight of criteria should be consistent with the goals of the program. Rating standards should be constructed in a graduated fashion to prevent an all or nothing decision for a particular criterion.
- 2. Review Team: Depending upon the nature of the solicitation, the proposals will be reviewed by Career TEAM procurement personnel and a review team from the appropriate committee or initiative board. All members are expected to read all competing proposals. Sections of proposals should not be subdivided among different committees. The review team will complete scoring sheets that list the technical rating criteria and any other evaluation factors contained in the request for proposals. The members of the Career TEAM procurement team will conduct the cost-price analysis.
- 3. Rating: Rating sheets should direct the reviewer to the relevant sections of the solicitation that are the basis for assignment of points. Rating sheets should be completely filled out, signed and certified (no conflicts) by the reviewers. The ratings should be summarized and aggregated.

4. Recommendations and approval: Contracts must be awarded to the applicant that presents the best services at the most favorable price. The results of the evaluation should then be forwarded in writing by the review committee and to the appropriate initiative board.

PROTEST PROCEDURE

1. The applicant must submit an appeal of the award decision to the Executive Director of Career TEAM no later than two weeks after the decision is announced.
2. Career TEAM will review appeals in a responsive and timely manner with procedures consistent with the awarding agency.
3. The decision of the Chief Executive Officer, Procurement Officer and/or individual appointed to lead the protest review process will be final.

ADMINISTRATIVE ISSUES ARISING OUT OF A PROCUREMENT PROTEST

1. Career TEAM will maintain responsibility for the settlement of all contractual and administrative issues arising out of procurements such as source evaluations, protests, disputes, and claims. Career TEAM will follow good administrative practice and apply sound business judgement.
2. Career TEAM will expect protesters to follow relevant protest procedures and exhaust all administrative remedies before pursuing a protest with a state or Federal agency. Reviews of Federal protest will include only violations of Federal law or regulations and the standards of 2CFR Part 200.317, and violations of the stated protest procedures for failure to review a complaint or protest.

FAILED COMPETITION

1. The solicitation process must be documented and a failed competition analysis must answer the following questions:
 - a. Was there a weakness in the solicitation specifications? Was the statement of work clear? Was the statement of work too narrowly defined? Were the administrative requirements too cumbersome? Was there an excessive amount of experience required? Was the cost Career TEAM was willing to pay too low? Was there adequate time to prepare proposals?
 - b. Was the solicitation advertised in an adequate number of locations?
 - c. Are the products or services only available from one organization or individual?
2. If the process was flawed, a new RFP should be issued and the product or service procured competitively. If the process was not flawed and only one vendor can provide the product or services, a cost and price analysis must be completed prior to awarding the contract.

PRIOR APPROVAL OF FUNDING AGENCY

1. Prior written approval by the funding agency must be obtained for any sole source award in excess of \$100,000. If an award that initially was less than \$100,000 is modified to exceed \$100,000, the request for approval must be submitted to the funding agency. All such awards must be justified and documented. Requests for agency approval must include the following information: the applicant's proposal, cost and price analysis, meeting minutes, justification for the noncompetitive award, the failed competition analysis and a cover letter requesting approval. Noncompetitive awards will not be approved retroactively. Sole source awards in an amount below \$100,000 need not be submitted to the funding agency for approval; however, Career TEAM must internally document and justify these awards.

CONTRACTING

1. Multi-year funding of contractors must be consistent with the requirements of the funding agency and within the conditions of the RFP and award. Funding for a second year must be contingent upon successful performance.
2. Career TEAM may use any of four types of contracts:
 - a. Cost Reimbursement: WIOA regulations require that agreements between governmental units must be cost-reimbursement contracts. This includes agreements with community colleges and vocational technical schools. This contract type may be required for funding of "high-risk" contractors.
 - b. Fixed Unit Price: Requires payment of a specified price for specified deliverables irrespective of actual costs incurred.
 - c. Combination Cost Reimbursement and Fixed Unit Price: Utilized when some elements of performance are clear and definitive while other performance specifications are more uncertain.
 - d. Letter Contracts and Limited Agreements. Letter contracts and limited agreements may be used to expedite entry into an agreement with a contractor only in emergency or unique situations. They may not obligate Career TEAM to enter into the final or full contract should contract negotiations fail. Such agreements should not be used as, or in place of, full contract documents. Justification or explanation of the nature of the emergency or unique situation requiring the use of letter contracts or limited agreements should be maintained in the contract file. Such agreements should include the following provisions:
 - i. Specific deliverables required by, and within the time frame of the limited agreement. This may be achieved through reference to the contract proposal.

- ii. Ceiling price of the limited agreement and the anticipated ceiling price of the final or full contract pending.
 - iii. The limit of Career TEAM liability pending finalization of the full contract document, including a provision that the limited agreement does not imply an obligation to enter into a final or full contract.
 - iv. Incorporate the Career TEAM standard terms and conditions boilerplate.
 - v. Active time period and execution date with all required authorized signatures.
3. "High-Risk" Contractors
- a. A contractor may be considered "high-risk" if Career TEAM determines that the contractor is otherwise responsible, but has a history of unsatisfactory performance; is not financially stable; has a management system which does not meet required management standards; or has not conformed to terms and conditions of a previously awarded contract or agreement.
 - b. When a contractor is considered "high-risk", special funding restrictions to address the "high-risk" status may be included in the agreement. Such restriction may include, but are not limited to: making payment on a reimbursement basis; requiring additional and/or more detailed financial or performance reports; performing additional monitoring; requiring the contractor to obtain specific technical or management assistance; and/or establishing additional prior approvals for stages of the work or expenditure of funds.
 - c. Should Career TEAM impose such funding restrictions, the contractor must be notified in writing as early as possible, of: the nature of the funding restrictions; the reason(s) for imposing the restrictions; any corrective actions which must be taken before the restrictions will be removed, and the time allowed for completing the corrective actions; and the method of requesting reconsideration of the restrictions imposed.

CONTRACT NEGOTIATION AND AWARD

1. The Career TEAM Procurement Officer with assistance as warranted from corporate staff and the field site leader is responsible for proposal negotiation, final contract negotiation and award, as well as the method and scope of elements subjected to negotiation for proposals and contracts. The Procurement Officer may delegate the responsibility.
2. Career TEAM will confirm that the vendor has not been debarred by querying the epls.gov data base before contract negotiations begin.
3. Career TEAM will negotiate program income as a separate element of the price. To establish a fair and reasonable level of program income, consideration will be given to

the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of the subcontract, the quality of its record of past performance, and industry program income in the surrounding geographical area for similar work.

4. Proposal negotiation discussions with applicants should be restricted to proposal deficiencies and requests for additional technical or cost and price information. Upon completion of proposal negotiations, applicants must submit a revised proposal to be reviewed again for technical and cost/price evaluation prior to award. Contract negotiations should not significantly alter the technical or cost/price aspects of the proposals.

SUBCONTRACTS

1. Subcontracts must be approved by Career TEAM prior to the effective date of the contract with a subcontractor. Such agreements are allowable, but they must be consistent and in compliance with all related federal, state and local procurement and contracting laws, regulations and policies. The approval may occur during contract negotiations or at any time during the contract period. Retroactive contracting for new contracts or for active contract modifications is not allowed.

CONTRACT ELEMENTS

1. Contracts must include all elements necessary to fully delineate Career TEAM's and contractor's responsibilities. These should be clearly documented through a combination of standard boilerplate and specific contract provisions. Proposals may be incorporated, in part or whole, by reference in the contract document.
2. The development and inclusion of specific contract elements will be affected by the determination of the contractor's status as a subrecipient or a contractor. Aspects of the contract effected by this status may include, but are not limited to cost classification, audit, and the general requirement to comply with WIOA and funding source regulation and policy. Although service providers may be considered subrecipients or contractors, all costs of contracts that are not exclusively for the provision of administrative functions are program costs.
 - a. Subrecipient: A legal entity to which a contract is awarded and which is accountable to the Career TEAM for use of the funds provided. Distinguishing characteristics of a subrecipient include items such as: developing and operating programs specifically designed for a federal program which may include determining eligibility of applicants, enrollment of participants, performance measured against meeting the objectives of the program, responsibility for programmatic decision making, and responsibility for compliance with program requirements. Subrecipient contracts identify the source of funds and require compliance with all related regulations and policy, including but not limited to,

appropriate identification and classification of all costs incurred and coverage under required audits.

- b. Contractor: An entity responsible for providing goods or services to be used by the program or project. These goods or services may be for the subrecipient's own use or for the use of participants in the program or project. Distinguishing characteristics of a vendor include items such as: providing the goods and services within normal business operation; providing similar goods or services to many different purchasers, including purchasers outside of the program; and operating in a competitive environment.
3. Contracts should contain the following elements as warranted:
- a. Cover Sheet: names of responsible parties and organizations, type of contracting organization (vendor or subrecipient), type of contract, amount of contract obligation, source of contract funds, address and contact information, contract effective time period, document execution date(s), signatures of authorized officials
 - b. Statement of work and deliverables, including but not limited to the number of participants to be served,
 - c. Budget: for cost reimbursement contracts, a line item budget cost category and invoice forms and procedures; for fixed-unit price contracts, a schedule of the delivery of the product(s) and services and the amount of payment upon delivery of each product or service and invoice forms and procedures
 - d. Contract Terms and Conditions
 - e. Debarment and suspension certification
 - f. Anti-lobbying disclosure
 - g. Program and financial reporting requirements
 - h. Contract close-out requirements

CONTRACT ADMINISTRATION

1. The corporate leader or site leader assigned to the contract is responsible for contract administration. The primary purpose of contract administration is to ensure contractor compliance with all contractual obligations including, but not limited to, program performance and financial requirements.
 - a. Monitoring performance through reports and/or site visits. Monitoring may be performed on-site or through in-house desk reviews of contractor reports, but should be timely and of sufficient frequency to detect deficiencies prior to contract failure. Financial monitoring must ensure that auditable records of

financial activity are maintained and retained. WIOA financial monitoring is the responsibility of the Norwood Employment and Training Administration, following ETA guidelines and procedures. Program monitoring should address the following areas: quality of services, achievement of contract objectives and goals, and compliance with contractual and federal, state and local laws, regulations, and policies

- b. Providing technical assistance and resolving any disputes that may arise.
- c. Approving invoices to ensure that the request for payment is consistent with contract terms
- d. Developing and overseeing a corrective action plan when the contractor does not meet the terms of performance.
- e. Reviewing and processing requests for contract modifications.
- f. Developing and implementing a close out plan at the end of the contract, including, at a minimum, final program reports, disposition of equipment, final invoice, deliverables and any other documents required in the contract.
- g. Ensuring that all required documents are in the central file.