



careersourcerc.com

May 6, 2026

To Whom It May Concern:

The Workforce Development Board dba CareerSource Research Coast (CSRC) is seeking statements of qualifications from firms interested in providing fiscal and programmatic monitoring services for the period of July 1, 2026 through June 30, 2031. The contract may be extended for one year at a time, up to four consecutive years, (ending June 30, 2031) based on performance. You are invited to submit a proposal. Veteran, small and/or minority owned are encouraged to apply.

Instructions for submitting proposals are included in the RFQ, available for download on our website, <https://careersourcerc.com/about-careersource-research-coast-2/request-for-proposal-request-for-quote/>. Interested parties must complete the proposal package as instructed and submit one (1) original signed in blue and five (4) copies if submitted by mail or submit an electronic version to CSRC no later than 5:00 PM on June 3, 2026, to be considered. CSRC will only consider proposals delivered by the deadline.

This request does not oblige CSRC to award a contract. CSRC reserves the right to accept or reject any or all proposals received.

We look forward to hearing from you

Sincerely,

Lisa Delligatti, CFO

info@careersourcerc.com
Administrative Office
4100 Okeechobee Road, Unit 90A, Fort Pierce, FL 34947
p: 866.482.4473 | f: 866.314.6580

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CareerSource RESEARCH COAST

Request for Qualifications

For

FISCAL & PROGRAMMATIC MONITORING

For the Period
July 1, 2026
to
June 30, 2031

RFQ #26-001-MTR

Date Issued: May 6, 2026
Deadline for Submission: June 3, 2026

Quotes should be directed to:

Lisa Delligatti, CFO
CareerSource Research Coast
4100 Okeechobee Road, Unit 90A
Fort Pierce, FL 34957
(866) 482-4473
proposals@careersourcerc.com

CareerSource Research Coast is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711. For program funding details in compliance with the Stevens Amendment, please visit www.careersourcerc.com/program-funding

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GENERAL INFORMATION

A. INTRODUCTION

The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) is seeking statements of qualifications from firms interested in providing independent fiscal and programmatic monitoring services for Program Year (PY) 2026-2031 (July 1, 2026-June 30, 2031). Please consider this document a formal request for qualifications (RFQ), responses to which will be used to determine the best qualified firm for these services and will be the basis for negotiating a contract. The contract may be extended for one (1) year at a time, up to four (4) additional consecutive years (PY ending 6/30/2031) if the performance of the provider so warrants. Renewal will be the option of CSRC. The monitoring services are to be provided at least two times for fiscal purposes and for at least one-time programmatic purposes.

B. BACKGROUND OF ORGANIZATION

CSRC is a private not-for-profit corporation registered under Section 501(c)(3) of U.S. Internal Revenue Code and serves the Local Workforce Development Area (LWDA) 20; a three-county area that includes Indian River, Martin and St. Lucie Counties. A Board of Directors comprised of volunteers, who represent private sector business, economic development, education, organized labor, community-based organizations, veterans, and state and local government agencies from all three counties in the region, governs CSRC. Joint oversight is provided through an agreement with CSRC and County Commissioners from each of the three counties in LWDA 20. These commissioners make up the area's workforce Consortium. The Consortium oversees CSRC. Additional information regarding CSRC and its members is located on CSRC's website at: www.careersourcerc.com.

C. RFQ OBJECTIVES

CSRC is seeking statements of qualifications from vendors interested in providing independent fiscal and programmatic monitoring services for the term from July 1, 2026-June 30, 2031. Please consider this document a formal request for qualifications (RFQ), responses to which will be used to determine the best qualified vendor and will be the basis for negotiating a contract. The contract may be extended for one (1) year at a time, up to four (4) additional consecutive program years (PY-7/1 thru 6/30) if the performance of the provider so warrants. Renewal will be the option of CSRC's Board of Directors. The monitoring services are to be provided at least two (2) times for fiscal purposes and one (1) time for programmatic purposes.

D. SCOPE OF WORK

Because the purpose and objectives of the monitoring effort may differ from each sub-recipient, the extent and scope of monitoring services may vary. The final monitoring schedule and agreed upon procedures will be a negotiated part of the contract.

1. Administrative/Fiscal Monitoring

The scope of the administrative and fiscal monitoring includes tests, where appropriate, of whether CSRC and its sub-recipients receive, disburse, safeguard and account for funds in compliance with the terms and conditions of the sub award, applicable federal, state statutes and regulations.

In addition to compliance testing in these areas, monitoring encompasses examination of CSRC and subrecipients' procedures and practices to determine the extent to which, in the monitor's opinion, such practices are efficient and effective.

2. Programmatic Monitoring

The scope of programmatic monitoring includes tests to determine whether CSRC and its sub-recipients are providing services and achieving program outcomes in accordance with the terms and conditions of the sub-award, applicable federal and state statutes and regulations, and local policy and procedures. Programmatic monitoring also includes tests of compliance with program regulations governing participant eligibility determination and documentation, service delivery, recordkeeping, data entry and case management.

In addition to compliance testing in these areas, monitoring encompasses examinations of procedures and practices to determine the extent to which, in the monitor's opinion, such practices are efficient and effective.

3. Staff Training and Technical Assistance

The firm selected and engaged, because of this RFQ, must be willing to provide selected CSRC staff with technical assistance and training in monitoring concepts, procedures and techniques as part of its contracted services.

4. Work Product

The principal work product of the monitoring effort is a written report that details the results and opinions of the monitor with respect to the tests and examinations conducted.

E. QUOTE CONTENT

Should your firm be interested in providing these services, please include the following information in your response in the order presented below:

1. Cover letter

Please include in your cover letter:

- a. Legal name of firm
- b. Address
- c. Name and title of firm owner, principal or managing partner
- d. Federal Employer Identification Number (FEIN)
- e. Dun and Bradstreet (D&B) number
- f. Organization type (Private for profit, non-profit or governmental corporation, sole proprietorship, community-based organization, etc.)
- g. Phone/FAX number and email address/website of the firm
- h. Name of primary contact for the RFQ
- i. Phone/FAX number and email address of the primary contact

2. Experience

Your firm's experience in providing monitoring services to workforce development boards:

- a. Provide a brief description of your firm.
- b. Describe the engagements your firm currently has in the workforce development industry. If partners or other employees serve in an advisory capacity, please list such positions.
- c. Indicate the levels of individuals who would be assigned to this engagement and explain how your firm will provide continuity of staff throughout the engagement.
- d. Describe your firm's basic approach to performing monitoring service and the resulting advantages which will accrue to our organization. You should identify how a monitoring engagement is planned and scheduled; the level of partner and manager commitment; quality control mechanisms; and other areas you feel are important.

3. Other Services Available:

Please indicate that your firm is willing and able to provide training and consultation services, as an element of a successfully negotiated contract for monitoring services, to CSRC staff in fiscal and programmatic monitoring concepts, procedures, and techniques.

4. Scope of Monitoring Services:

- a. State what effective methods you have used in similar engagements to monitor recipient activities.
- b. State what specific experience you have in monitoring engagements with federally funded organizations.

5. Fees:

- a. Provide information regarding your fee schedule for an engagement of this type, including the expected rate per hour of each staff. State whether out-of-pocket expenses are included in your fee schedule.
- b. Based on your understanding of the scope of the project described in the RFQ, please provide an estimate of the total number of staff hours required to complete the engagement.

6. References:

Please provide a listing of clients CSRC may contact. Clients listed should be similar in nature to our organization and be serviced by the same staff who would be assigned to this engagement. Please include specific contact name and telephone number.

7. Other Information:

Please include any additional information not already requested that you consider essential to your response. If there is no additional information to include, please state, "There is no additional information we wish to present."

QUOTE SUBMISSION

A. GENERAL QUOTE INSTRUCTIONS

Vendors are advised to read this entire request for qualifications before preparing and submitting a response. Responses which do not follow the format, do not include all the minimum requirements specified in this RFQ, or are not submitted by the due date will not be considered. Quotes can be submitted either by USPS/UPS/FEDEX or email.

Quotes must be postmarked by or emailed to the address below by 5pm EST on June 3, 2026:

CareerSource Research Coast
Attention: Lisa Delligatti, CFO
4100 Okeechobee Road, Unit 90A, Fort Pierce, FL 34947
<mailto:proposals@careersourcerc.com>

Please show the solicitation number **RFQ# 26-001-MTR** and the name and address of the Vendor on the front of the envelope or in the subject line of the email

Any response to this RFQ, or portion thereof, received after the submittal deadline will not be considered.

Quotes must be fully responsive to this RFQ to be rated. To be responsive, quotes must meet the following minimum criteria, as stated in this RFQ:

1. One (1) original quote and four (4) additional copies must be postmarked by **5pm EST June 3, 2026, if mailed**. Each copy of the quote must be bound separately. The quote and all attachments are to be standard size (8 ½ X 11). In addition, a table of contents is required. The timely submission of a quote is entirely the responsibility of the Vendor.
2. The original quote must be manually signed in blue ink by an official authorized to represent and bind the proposing agency and should be marked "original."
3. If Vendor so chooses, an electronic, searchable copy can be submitted by email to proposals@careersourcerc.com by 5:00pm EST on June 3, 2026.
4. Giving incomplete or erroneous information or withholding important information could result in disqualification or, later, contract termination.

All quotes must conform to the format described later in this document and contain all the requested information and attachments. Proposers are encouraged to keep quotes concise and to the point. CSRC will furnish no material, labor, or facilities for either development of a quote or completion of the desired project unless otherwise provided for in this RFQ. Changes, modifications, or additions cannot be made to a quote after the submission date.

B. SOLICITATION TIMELINE

Action	Date
Issue RFP	May 6, 2026
Question and Answer Period	May 7, 2026 – May 27, 2026
Final Q&A Responses Posted By	June 1, 2026
RFP Due	June 3, 2026
Technical Review	June 4, 2026
Rating Team Review	June 5, 2026
Selection of Quote*	June 24, 2026

C. INQUIRIES

CSRC will provide clarifying information about this request for quote only and will not provide technical assistance or advice. All questions must be submitted via the CSRC website at <https://www.careersourcerc.com/rfq-26-001-mtr/> by May 27, 2026. Answers to all questions received will be posted to the webpage within 48 business hours. This is a competitive process. CSRC staff will not provide any information from other quotes or other costs associated with similar projects.

D. CONDITIONS OF QUOTE

The following conditions are applicable to all quotes:

1. CSRC reserves the right to reject all quotes, in whole or in part, and to accept any quote that is deemed most favorable to CSRC at the time and under the conditions stipulated in this RFQ.
2. Non-conforming quotes will be considered non-responsive and are subject to return without review; however, CSRC reserves the right to waive informalities and minor irregularities in the quotes received.
3. CSRC reserves the right to request additional information from Vendors for clarification or to allow corrections or errors or omissions, if in the best interest of CSRC.
4. All quotes are subject to negotiation by CSRC.
5. CSRC reserves the right to retain all quotes submitted and to use any ideas in a quote regardless of whether that quote is selected. Submission of a quote indicates acceptance by the firm of the conditions contained in this request for quotes unless clearly and specifically noted in the quote submitted and confirmed in the contract between CSRC and the firm selected.
6. All costs incurred in the preparation of a quote responding to this RFQ will be the responsibility of the Vendor and will not be reimbursed by CSRC. The Vendor must, at their own expense, obtain all necessary permits and pay all licenses, fees, insurances and taxes required to comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried out under the proposed contract.

E. INITIAL TECHNICAL REVIEW

All timely quotes received will be reviewed by CSRC employees to determine if they are responsive and if the quotes are eligible for further consideration. Quotes may be judged nonresponsive and removed from further consideration if the quote is not received timely in accordance with the terms of this RFQ, does not include the required information; does not include the required certifications and is not adequate to form a judgment by the reviewers that the quote meets the needs of CSRC and the intent of this RFQ.

F. REVIEW BY RFQ REVIEW TEAM

An RFQ Review Team will be organized to review and rate quotes. This team will review quotes successfully passing the initial technical review. Quotes will be evaluated using a point system. The Team will review and discuss their evaluations of all quotes, combine the individual scores and arrive at a composite technical score for each quote. These scores will be used to determine the most advantageous contract award for CSRC.

G. SMALL AND/OR MINORITY-OWNED BUSINESSES

Efforts will be made by CSRC to utilize local small business, minority or women-owned businesses. A Vendor qualifies as a small business firm if it meets the definition of "Small Business" as established by the Small Business Administration (13 CFR 21.3-8) by having average annual receipts for the last three fiscal years of less than four million dollars.

H. QUOTE ACCEPTANCE/PROTEST

This request for qualifications does not obligate CSRC to award a contract. CSRC reserves the right to accept or reject any or all quotes received. The contract, if awarded, will be for five (5) years with a one (1) year contract to be renewed annually based upon performance.

Any award resulting from this request will be based on the vendor's stability and experience related to this RFQ and the vendor's ability to handle the tasks noted in this RFQ.

CSRC reserves the right to waive informalities and minor irregularities in offers received.

Before a contract is offered, the vendor must submit the required certifications provided later in this packet.

If you are unable to provide this information, please do not submit a quote.

CSRC may award a contract based on initial quotes received without negotiation of such quotes. Therefore, each initial quote should be submitted on the most favorable price and technical terms. CSRC reserves the right to request additional information, oral discussion or presentation in support of written quotes.

All vendors have the right to protest the award. Parties wishing to protest a contract award may submit their objections in writing within 10 days of the award date to the President/CEO of CSRC who will provide the information to CSRC's Executive Committee. This committee will investigate the complaint and issue a written finding and resolution to the protesting party within 45 days of the receipt of the complaint.

This protest procedure provides recourse to a vendor who believes that his/her quote did not receive proper consideration. Vendors entering a protest should be prepared to document specific factors that put the aggrieved vendor at a competitive disadvantage and/or document violations of specific sections of state or federal regulations, CareerSource Florida and the procedures set forth by this RFQ. CSRC reserves the right to refuse to consider an appeal that does not identify specific procedural shortcomings.

I. NEGOTIATIONS

A contract will be negotiated with the first ranked vendor, and if negotiations are successful, that vendor will be recommended to the CSRC Board of Directors for award. In the event negotiations are not successful, negotiations with that vendor will be terminated and negotiations begun with the second ranked vendor and so forth until negotiations are successfully completed to the satisfaction of CSRC or until all acceptable quotes have been rejected.

J. NOTIFICATION OF AWARD

Upon conclusion of final negotiations with the successful vendor, all vendors will be notified in writing of their status. The final award decision will be made no later than June 24, 2026 and contract negotiations may commence any time following that date.

REST OF PAGE INTENTIONALLY LEFT BLANK.

ATTACHMENT A - RELATIONSHIP DISCLOSURE FORM

This form must be completed by the vendor.

In the event of any information provided on this changes, the vendor must file an amended form on or before the date the item is considered by CareerSource Research Coast.

Part I: Information on Respondent

Legal Name of Vendor: _____

Business Address: _____

Phone Number: _____ Fax Number: _____

Part II:

Is vendor a relative of any CareerSource Research Coast principal? Yes No

Is any CareerSource Research Coast principal an employee of vendor? Yes No

Is vendor an employee of any CareerSource Research Coast principal? Yes No

Is vendor a business associate of any CareerSource Research Coast principal? Yes No

If you responded "Yes" to any of the above questions, please state with whom and explain the relationship (use additional sheets if necessary): _____

Part III: Original Signature Required

I hereby certify that information provided in this relationship disclosure form is true and correct based on my knowledge and belief. If any of this information changes, I further acknowledge and agree to amend this relationship disclosure form prior to the date of which CareerSource Research Coast awards an agreement for Fiscal & Programmatic Monitoring. In accordance with s.837.06 Florida Statutes, I understand and acknowledge that whoever knowingly makes a false statement in writing with the intent to mislead a public servant in the performance of his or her official duty shall be guilty of a misdemeanor in the second degree, punishable as provided in s.775.082 or s.775.083, Florida Statutes.

Printed Name/Title of Person Completing Form

Signature

Date

ATTACHMENT B - CSRC BOARD OF DIRECTORS/CONSORTIUM LISTING

- | | |
|--|--|
| 1. Will Armstead, CEO | Boys & Girls Club of St. Lucie County |
| 2. Werner Bols, President | Bols Construction |
| 3. Jim Brann, President | The Porch Factory |
| 4. Pamela Burchell, CEO | Pamela Burchell Consulting, LLC |
| 5. Jose Capellan, Veteran Services Officer | St. Lucie County |
| 6. Robert Cenk, Vice President | Homecrete Homes |
| 7. Joseph Cantrambone, President | Stuart/Martin County Chamber of Commerce |
| 8. Deborah Frazier, Executive Officer | Treasure Coast Builders Association |
| 9. David Freeland, President | St. Lucie County CTA/CU |
| 10. Kelly Johnson, Producer/Commercial Lines Manager | R.V. Johnson Insurance |
| 11. Michael Kauffman, Jr, Training Director | Ironworkers Local Union 402 JATC |
| 12. Leslie Kristof, Campus President | Keiser University/Port St. Lucie |
| 13. Lorna Landherr, Director of Human Resources | Cleveland Clinic Martin Health Systems |
| 14. Erin Lowry, Commissioner | St. Lucie County Board of County Commissioners |
| 15. Michael Maine, Superintendent | Martin County School District |
| 16. Dr. David Moore, Superintendent | Indian River County Public Schools |
| 17. Terrance Moore, CEO | Moore Solutions |
| 18. Dr. Timothy Moore, President | Indian River State College |
| 19. Dr. John Prince, Superintendent | St. Lucie Public Schools |
| 20. Kevin Staten, SVP Relationship Manager | Bank of America |

**CAREERSOURCE RESEARCH COAST, LWDA 20,
TREASURE COAST WORKFORCE CONSORTIUM MEMBERS**

- | | |
|--------------------------------------|---------------------|
| 1. Laura Moss, Commissioner | Indian River County |
| 2. Stacey Hetherington, Commissioner | Martin County |
| 3. Jamie Fowler, Commissioner | St. Lucie County |

ATTACHMENT C – GENERAL PROVISIONS AND ASSURANCES**ATTACHMENT TO THE WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST, INC.
D/B/A CAREERSOURCE RESEARCH COAST**

This attachment is part of the vendor agreement held between The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) and Vendor for described in the Agreement attached hereto. In consideration of the mutual covenant and stipulations set forth in the contract and Attachment herein, the parties hereby agree as follows:

1. COMPLIANCE WITH POLICIES AND LAWS

The warranty of this Section specifically includes compliance by Vendor with the provisions of the Immigration Reform and Compliance Act of 1986 (P. L. 99-603), the Workforce Innovation and Opportunity Act (WIOA), the provisions of the Workforce Investment Act of 1998, the Workforce Innovation Act of 2000, 45 CFR 98, the Temporary Assistance for Needy Families Program (TANF), 45 CFR parts 260-265 and other applicable federal regulations and policies promulgated thereunder and other applicable State, Federal, criminal and civil law with respect to the alteration or falsification of records created in connection with this Agreement. Office of Management and Budget (OMB) Circulars: Vendor agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200. Vendor will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. 276a to 276a7), the Copeland Act (40 U.S.C. 276c and 18 U.S.C. 874, and the Contract Work Hours and Safety Standards Act (40.327-333), regarding labor standards for federally assisted construction sub agreements.

2. CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER MATTERS

Vendor certifies that it is not currently debarred, suspended, or excluded from or for participation in Federal assistance programs, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency within a three-year period preceding the effective date of the Agreement in accordance with 29 CFR Parts 45, 74, 95 and 98. No contract shall be awarded to parties listed on the GSA List of Parties Excluded from Federal Procurement or Non-Procurement Programs.

3. NON-DISCRIMINATION, EQUAL OPPORTUNITY ASSURANCES, CERTIFICATIONS, OTHER PROVISIONS

As a condition for the award of financial assistance from the Department of Labor under Title I of the WIOA, the grant applicant assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

- Section 188 of the Workforce Innovation & Opportunity Act (WIOA), which prohibits discrimination against all individuals in the United States based on race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I- Financially assisted program or activity.
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination based on race, color, and national origin.
- Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities.
- The Age Discrimination Act of 1975, as amended, which prohibits discrimination based on age.
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination based on sex in educational programs.
- Section 654 of the Omnibus Budget Reconciliation Act of 1981 prohibiting discrimination based on race, creed, color, national origin, sex, handicap, political affiliation or beliefs.
- The American with Disabilities Act of 1990, P.L. 101-336 prohibiting discrimination in all employment practices, including the job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities; and

The Vendor also assures that it will comply with 29 CFR Part 37 and all other regulation implementing the laws listed above.

For contracts more than \$10,000, the Vendor will comply with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity" as amended by Executive Order 11375 of October 13, 1967, and supplemented on Department of Labor regulations at 41 CFR Chapter 60.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Services at 711.

4. CERTIFICATION REGARDING CLEAN AIR ACT, WATER ACT, ENERGY EFFICIENCY AND ENVIRONMENTAL STANDARDS, SOLID WASTE

Clean Air and Water Act: When applicable, if this Contract is more than \$100,000, Vendor shall comply with all applicable standards, orders or regulations issued under the Clean Air Act as amended (42 U.S.C. 7401), Section 508 of the Clean Water Act as amended (33 U.S.C. 1368 et seq.), Executive Order 11738 and Environmental Protection Agency regulations (40 CFR Part 15). The Vendor shall report any violation of the above to the contract manager. Energy Efficiency: The Vendor shall comply with mandatory standards and policies relating to energy efficiency which are contained in the State of Florida's Energy Conservation Plan issued in compliance with the Energy Policy and Conservation Act (Public Law 94-163).

Vendor will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. 1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205). The Vendor will comply with the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act (42 U.S.C. 6962).

5. CERTIFICATION REGARDING LOBBYING AND INTEGRITY

Vendor shall comply with the provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) 29 CFR Part 93. When applicable, if this Agreement is more than \$100,000, Vendor must, prior to contract execution, complete the Certification Regarding Lobbying Form.

6. CONFIDENTIALITY

It is understood that the Vendor shall maintain confidentiality of any information, regarding CSRC customers and the immediate family of any applicant or customer, that identifies or may be used to identify them, and which may be obtained through application forms, interviews, tests, reports from public agencies or counselors, or any other source. Vendor shall not divulge such information without the written permission of the customer, except that such information which is necessary as determined by CSRC for purposes related to the performance or evaluation of the Agreement may be divulged to

CSRC or such other parties as they may designate having responsibilities under the Agreement for monitoring or evaluating the services and performances under the Agreement, or to governmental authorities to the extent necessary for the proper administration of the law. All release of information shall be in accordance with applicable State laws, and policies of the CSRC. No release of information by Vendor, if such release is required by Federal or State law, shall be construed as a breach of this Section.

7. RIGHTS TO DATA/COPYRIGHTS AND PATENTS

CSRC, State of Florida and the U.S. Department of Labor shall have unlimited rights to inventions made under contract or agreement: Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements" and any implementing regulations issued by the awarding agency.

8. MONITORING

At any time and as often as CSRC, the State of Florida, United States Department of Labor, Comptroller General of the United States, the Inspector Generals of the United States and the State of Florida, or their designated agency or representative may deem necessary, Vendor shall make available all appropriate personnel for interviews and all financial, applicant, or participant books, documents, papers and records or other data relating to matters covered by this contract, for examination and/or audit, and/or for the making of excerpts or copies of such records for the purpose of auditing and monitoring activities and determining compliance with all applicable rules and regulations, and the provisions of this Agreement. The above-mentioned records shall be made available at the Vendor expense, at reasonable locations as determined by CSRC. Vendor shall respond in writing to monitoring reports and requests for corrective action plans within 10 working days after the receipt of such request from CSRC.

9. TERMINATION FOR DEFAULT/CONVENIENCE

This modified agreement may be terminated as follows:

- a. Either party may request termination of modified agreement upon 60 days prior written notice to the other party.
- b. CSRC may unilaterally terminate or modify this modified agreement, if for any reason either the U.S. Department of Labor or the State of Florida reduces funding through the grants under which this modified agreement is funded.
- c. CSRC may unilaterally terminate this modified agreement at any time that it is determined that:
 - i. Vendor fails to provide any of the services it has contracted to provide; or
 - ii. Vendor fails to comply with the provisions of this modified agreement; or
 - iii. Such termination is in the best interest of CSRC.
- d. Written notification of termination must be by registered mail, return receipt requested.

If Vendor disagrees with the reasons for termination, they may file a grievance in writing within ten days of notice of termination to the CSRC Executive Committee, who will conduct a grievance hearing and decide, from evidence presented by both parties, the validity of termination.

In the event this modified agreement is terminated for cause, Vendor shall be liable to CSRC for damages sustained for any breach of this modified agreement by the Vendor, including court costs and attorney fees, when cause is attributable to the Vendor.

In instances where Vendor violates or breaches modified agreement terms, CSRC will use all administrative, contractual, or legal remedies that are allowed by law to provide for such sanctions and penalties as may be appropriate.

10. PUBLIC ANNOUNCEMENTS AND ADVERTISING

Vendor agrees that when issuing statements, press releases, request for quotes, bid solicitation, and other documents describing the project or programs funded in whole or in part under this Agreement, Vendor shall clearly state: (1) the percentage of the total cost of the program or project which will be financed with Federal money under this Agreement and (2) the dollar amount of Federal funds for the project or program.

11. PUBLIC ENTITY CRIMES

Vendor shall comply with subsection 287 .L33(2)(a), F.S., whereby a person or affiliate who has been placed on the convicted Lessor list following a conviction for a public entity crime may not submit a bid, quote, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, quote, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, quotes, or replies on leases of real property to a public entity; may not be awarded or perform work as a Lessor, supplier, sub-Lessor or consultant under a contract with any public entity and may not transact business with any public entity in excess of the threshold amount provided in section 287.Ot7, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted Lessor list.

12. THE PRO-CHILDREN ACT

Vendor agrees to comply with the Pro-Children Act of 1994, 20 U.S.C. 6083. Failure to comply with the provisions of the law may result in the imposition of civil monetary penalty up to \$1,000 for each violation and/or the imposition of an administrative compliance order on the responsible entity. This clause is applicable to all approved sub-contracts. In compliance with Public Law (Pub. L.) LO3-277, the Contract shall not permit smoking in any portion of any indoor facility used for the provision of federally funded services including health, day care, early childhood development, education, or library services on a routine or regular basis, to children up to age 18.

13. PROCUREMENT OF RECOVERED MATERIALS

Vendor agrees to comply with the provisions of section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, and as supplemented by 2 CFR Appendix II to part 200 and 2 CFR part 200.323 and the requirements stated therein.

14. DOMESTIC PREFERENCES FOR PROCUREMENTS

Vendor agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.322 and the requirements stated therein.

15. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT

Vendor agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.216 and the requirements stated therein. See [Public Law 115-232](#), section 889 for additional information and 2 CFR part 200.471.

16. E-Verify

Vendor warrants and represents that it complies with section 448.095, F.S., where the State of Florida expressly requires the following:

- i. Every public employer, contractor, and subcontractor shall register with and use the E-Verify system to verify the work authorization status of all newly hired employees. A public employer, contractor, or subcontractor may not enter into a contract unless each party to the contract registers with and uses the E-Verify system.
- ii. A private employer shall, after making an offer of employment which has been accepted by a person, verify such person's employment eligibility. A private employer is not required to verify the employment eligibility of a continuing employee hired before January 1, 2021. However, if a person is a contract employee retained by a private employer, the private employer must verify the employee's employment eligibility upon the renewal or extension of his or her contract. As of July 1, 2023, all private employers in Florida with 25 or more employees will be required to use E-Verify, the federal government's database for verifying work authorization.

17 NEVER CONTRACT WITH THE ENEMY

Contractor agrees to comply with regulations implementing Never Contract with the Enemy in 2 CFR, part 183. The regulations in 2 CFR, part 183 affect covered contracts, grants and cooperative agreements that are expected to exceed \$50,000 within the period of performance, are performed outside the United States and its territories, and are in support of a contingency operation in which members of the Armed Forces are actively engaged in hostilities.

Vendor Name: _____

Authorized Representative

Printed Name & Title: _____

Authorized Representative

Signed Name & Title: _____ Date: _____

ATTACHMENT D - INITIAL TECHNICAL REVIEW – RFQ #26-001-MTR

VENDOR: _____

Did the quote meet all of the following criteria? If not, the quote may not be submitted for further review.

- Quote met due date and time: Yes No
- Quote included one original, four copies and an electronic version? Yes No
- Original quote contains representative signature(s) in blue ink? Yes No
- Quote was submitted with all required information provided? Yes No
- Vendor included a list of clients for contact? Yes No
- Vendor provided a fee schedule as requested? Yes No
- Vendor indicated a financial relationship with either CareerSource Research Coast Board of Directors or the Treasure Coast Workforce Consortium and the relationship is a conflict of interest? Yes No

Employees Review Results:

- Vendor has previously provided services to CareerSource Research Coast or other similar government funded programs? Yes No
- If yes, employees will prepare a statement to indicate past performance, cost, and note any outstanding issues. All outstanding issues must be resolved prior to consideration of a new contract. Yes No
- References were contacted by CareerSource Research Coast's employees and the information indicates the provider is capable of delivering the services requested? Yes No

FORWARD TO THE RATING COMMITTEE Yes No

Technical Review Completed by: _____

Date: _____

5. The firm appears to be able to meet the proposed timetable for completing the monitoring: _____
(Proposed staffing appears adequate)

More than Capable.....Not Capable
5 4 3 2 0

Comments: _____

6. The firm provided quality references: _____

High Quality Low Quality
10 8 5 3 0

Comments: _____

7. The firm has a demonstrated record of meeting performance requirements: _____
(The firm has experience monitoring and/or auditing WIOA, Wagner Peyser and TANF programs.)

Extensive Experience/
Outstanding Performance No Performance No Experience/
10 8 5 3 0

Comments: _____

8. The firm can offer a full array of fiscal and programmatic consulting services on an ongoing basis: _____

More than Capable.....Not Capable
10 8 5 3 0

Comments: _____

9. The cost to perform the service appears reasonable and includes a cost for fiscal and Programmatic monitoring: _____

Very Reasonable.....Not Reasonable
10 8 5 3 0

Comments: _____

