

Request for Proposals

BankWork\$[®] Pittsburgh

Training and Career Services for Financial Services Occupations

For the period of July 1, 2026 to June 30, 2027

With possibility for annual renewal contracts

RFP Release Date:

April 14, 2026

Proposal Deadline:

May 15, 2026 at 11:59pm ET

Partner4Work
650 Smithfield Street, Suite 2400
Pittsburgh, PA 15222
rfp@partner4work.org

Table of Contents

1. General Information	2
2. Statement of Work	7
3. Proposal Requirements and Process	15
Appendix A – RFP Cover Sheet	20
Appendix B – Administrative Requirements	21
Appendix C – Budget Narrative Instructions	23
Appendix D – Program Partner Roles	25
Appendix E – BankWork\$ Position Descriptions	26
Appendix F – BankWork\$ Curriculum Overview	29

1. General Information

This section provides the general and background information needed to understand the purpose and context of this RFP. It also describes important details regarding the services and stakeholders related to this RFP, as well as basic characteristics of any agreements that may result from this RFP.

About Partner4Work

TRWIB, Inc. (dba "Partner4Work") is the workforce development organization that connects funding, expertise, and opportunities to develop a thriving workforce in Pittsburgh and Allegheny County. With a budget of more than \$25 million in public and private workforce funds, Partner4Work delivers a comprehensive portfolio of programs and initiatives for adults and youth to ensure that current and future needs of employers, job seekers, and underemployed workers are met.

Helping businesses find and prepare the talent they need to thrive

As a non-profit organization, Partner4Work offers a wide variety of no-cost services to help regional employers attract the talent they need to thrive. From customized labor market data to assistance with finding diverse talent, Partner4Work is the resource to deliver customized employment solutions for any business.

Breaking down barriers to career opportunities

Partner4Work helps provide adult and young adult job seekers with the opportunities to find meaningful employment. Through our providers, we provide access to career training and exploration programs; employment assistance; job search help; and a robust summer jobs program. Partner4Work opens the door to career opportunities.

Providing community organizations with resources to make an impact

Partner4Work proudly partners with more than 80 organizations in Pittsburgh and Allegheny County to provide opportunities for job seekers and businesses alike. We partner with community-based organizations, economic development agencies, training providers, businesses and educators to collectively bridge the gap between people looking for work and employers in need of talent.

As the Workforce Development Board (WDB) for Pittsburgh and Allegheny County, Partner4Work has programmatic and administrative responsibility for services of the Workforce Innovation and Opportunity Act (WIOA) provided in the workforce development areas of Pittsburgh and Allegheny County. Partner4Work also oversees employment and training programs for recipients of Temporary Assistance for Needy Families (TANF) and the Supplemental Nutrition Assistance Program (SNAP) in Allegheny County.

Purpose of this RFP

Through this RFP, Partner4Work seeks a qualified organization to provide implementation of the BankWork\$[®] program in the Pittsburgh area, including provision of career training, placement assistance, ongoing coaching, and further supports, to a range of individuals with barriers to employment, according to the standards of the BankWork\$[®] program. The successful bidder will implement the BankWork\$[®] program from July 2026 to June 2027, during which time the successful bidder will train 60 individuals - 4 cohorts of 15 individuals each (a standard cohort for the BankWork\$[®] program consists of 15 individuals and is offered on a quarterly basis).

Partner4Work, in collaboration with CareerWork\$, the PA Bankers Association, and several of the region's leading financial institutions, is proud to offer the nationally recognized BankWork\$[®] training program in the Pittsburgh region. Developed by CareerWork\$ and the banking sector, and free to participants, BankWork\$[®] is designed to prepare individuals to

become qualified candidates for tellers, customer service representatives, and personal banker positions. In addition to the technical skills needed to succeed on the job, BankWork\$® students receive soft-skills training, coaching and mentoring, information about career pathways, interview prep, and other hands-on activities.

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

See the Statement of Work below for a more detailed description of the work required by the successful bidder.

To find out more about the BankWork\$® program:

- € www.partner4work.org/programs/bankworks-pittsburgh
- € www.careerworks.org/programs/bankworks/

Anticipated Awards

As a result of this RFP, Partner4Work expects to award one cost reimbursement-type contract, ranging from \$200,000 to \$300,000 in total value for the period of July 2026 to June 2027. See Program Cost Reimbursement Section for further information. Partner4Work intends to blend various funding sources, at its discretion and based on eligibility and funding availability, to support agreements resulting from this RFP. Funding sources may have different participant eligibility requirements. Potential funding sources include the following:

- € Workforce Innovation and Opportunity Act (WIOA)
 - ☒ WIOA Adult, Dislocated Worker, and Youth Programs
 - ☒ WIOA Statewide Activities
 - ☒ Reentry Employment Opportunities (REO)
- € Temporary Assistance for Needy Families (TANF)
 - ☒ Adult Employment & Training Programs
 - ☒ Youth Employment & Training Programs
 - ☒ Youth Development Program
- € Other funding sources
 - ☒ PAsmart grants - State of Pennsylvania
 - ☒ Industry Partnership grants - State of Pennsylvania
 - ☒ Private grants from foundations, businesses, and other entities

Partner4Work may choose to make additional funding sources available through contracts resulting from this RFP, based on availability and allowability. All contract costs must be reasonable and necessary to carry out planned functions, allowable, and allocable to the contract/cost categories.

Partner4Work reserves the right to vary or change the terms of any contract resulting from this RFP, including funding levels, the scope of work, performance standards, and shortening or extending of the contract period, as it deems necessary and in the best interests of Partner4Work.

The proposal(s) most advantageous to Partner4Work in terms of quality and cost will be recommended for funding.

The Stevens Amendment

The Stevens Amendment, Public Law 101-166, Section 511, is an appropriations provision that requires grantees of the Department of Labor (DOL), Health and Human Services (HHS), and Education to disclose for a grant program the percent of the costs financed with federal funds.

The program described in this RFP is supported through funding provided by the U.S. Department of Labor, the Pennsylvania Department of Labor & Industry, the Pennsylvania Department of Human Services, and other funding sources administered by Partner4Work. An estimated total of up to \$150,000 or 50 percent, of the total cost of the program will be financed with federal funds. An estimated total of up to \$150,000 or 50 percent, of the total cost of the program will be financed by other sources.

Period of Performance

Initial agreements resulting from this RFP are estimated to begin on or around July 1, 2026 and extend until June 30, 2027. Partner4Work may renew awarded agreements beyond June 30, 2027 for up to three additional contract periods, as shown in the table below, with the second, third, and fourth contract periods renewable at the discretion of Partner4Work, based on performance of the successful bidder, funds available, and any other factors, as determined by Partner4Work. Partner4Work reserves the option to modify contracts on a year-to-year basis. The agreement is not renewable after the fourth 12-month period.

<i>Anticipated Program Dates and Contract Periods</i>		
<i>Contract period 1 (base)</i>	<i>July 1, 2026 – June 30, 2027</i>	<i>Base contract award</i>
<i>Contract period 2 (option)</i>	<i>July 1, 2027 – June 30, 2028</i>	<i>Renewable by Partner4Work</i>
<i>Contract period 3 (option)</i>	<i>July 1, 2028 – June 30, 2029</i>	<i>Renewable by Partner4Work</i>
<i>Contract period 4 (option)</i>	<i>July 1, 2029 – June 30, 2030</i>	<i>Renewable by Partner4Work</i>

RFP Terms, Conditions, & Notices

Reservation of Rights

- **No obligation to award.** This Request for Proposals (RFP) does not commit Partner4Work to make an award, to pay any costs incurred in the preparation of a proposal, or to procure or contract for any services or supplies.
- **Right to reject, cancel, amend, or reissue.** Partner4Work reserves the right, at any time and in its sole discretion, to reject any or all proposals in whole or in part; waive minor, non-material irregularities; cancel this RFP; amend this RFP; issue addenda; extend deadlines; request revised proposals; reissue this RFP; issue additional solicitations for the same or similar services; or take any other action Partner4Work deems to be in its best interest and consistent with applicable law and funding requirements.
- **Clarifications, discussions, and presentations.** Partner4Work may request additional information from any Offeror, request clarifications, require oral presentations, conduct interviews, conduct site visits, request best and final offers or proposal revisions, and engage in discussions or negotiations with one or more Offerors, as Partner4Work determines appropriate.
- **Award without discussions.** Partner4Work may make an award based on initial proposals received, without discussions. Accordingly, each proposal should be submitted on the most favorable terms, from both a technical and price standpoint, that the Offeror can submit.
- **Whole, partial, multiple, or no award.** Partner4Work reserves the right to make one award, multiple awards, a partial award, or no award. Partner4Work may fund all, some, or none of a proposal; may remove, reduce, or

negotiate individual components of a proposal; and may later consider for funding a proposal not initially selected, if doing so is consistent with available funding, program needs, and applicable requirements.

- **Funding, approvals, and contract execution.** Any notice of selection or intent to award is conditional. No award shall be final unless and until Partner4Work has completed all required reviews and approvals and the parties have executed a mutually satisfactory written agreement. No work may begin, and no costs may be incurred or charged to Partner4Work, before full approval and execution of the agreement and, if required by Partner4Work, issuance of a written notice to proceed.
- **Availability of funds.** Any resulting award is subject to the availability of funds, continued authorization of the underlying program, satisfactory negotiations, contractor responsibility, and all applicable federal, state, local, and funding-source requirements.

Proposal and Award Conditions

- **Fair and open competition.** This RFP and any resulting award are subject to applicable federal, state, local, and funding-source requirements. Partner4Work intends to conduct this procurement in a manner that provides full and open competition and to make award, if any, to the responsible Offeror whose proposal is determined to be most advantageous to Partner4Work, considering price and other stated factors.
- **Responsibility and eligibility.** Before award, Partner4Work may require the apparent successful Offeror to demonstrate responsibility and eligibility, including financial capacity, technical capability, staffing, performance record, integrity, business ethics, legal authority, and ability to comply with the required delivery or performance schedule.
- **Required contract terms.** Any resulting agreement will incorporate Partner4Work's applicable contract template and other terms required by law, regulation, funding source, or Partner4Work policy. Submission of a proposal constitutes the Offeror's acknowledgment that it must be willing and able to enter into a written agreement containing such terms.

Public Records, Confidentiality, and Ownership

- **Proposal materials.** All proposals, attachments, and other materials submitted in response to this RFP become records retained by Partner4Work and will not be returned.
- **Confidential/proprietary information.** If an Offeror believes that any portion of its proposal contains trade secrets or confidential proprietary information, the Offeror must clearly identify those portions and label them accordingly. An Offeror may also be required, upon request, to provide a redacted version suitable for release. Marking material as confidential does not, by itself, bind Partner4Work or guarantee that the material will be withheld from disclosure.
- **Possible disclosure.** Offerors are advised that records in Partner4Work's possession may be subject to disclosure under applicable law, funding conditions, audit requirements, monitoring, governmental oversight, or records requests made to Partner4Work or to a governmental entity with access to the records. Partner4Work will handle proposal materials in a manner consistent with applicable law and will not knowingly disclose information that is prohibited from disclosure or exempt from release.
- **Deliverables and work product.** Ownership, license rights, access rights, and permitted uses relating to reports, data, materials, documentation, and other work product created or provided under any resulting agreement will be governed by the terms of the executed agreement. Offerors must be willing to accept the applicable provisions in Partner4Work's contract templates regarding those matters.

Equal Opportunity and Accessibility Notice. All programs and activities are equal opportunity employer/programs. Auxiliary aids and services are available upon request to individuals with disabilities. Persons who need assistance obtaining access to this RFP or related procurement information should contact Partner4Work using the contact information provided in this solicitation.

Populations to be Served

Partner4Work hopes to reach and support a broad range of populations through the programs solicited by this RFP, including individuals with varying characteristics across age, income, background, employment history, residential location, and other factors. The various funds Partner4Work oversees often include population-specific eligibility criteria (e.g., young adults 16 to 24, Dislocated Workers, recipients of public assistance, residents of certain locations, etc.). The successful bidder may be asked to focus recruitment and engagement efforts on certain population characteristics, depending on the funding made available through contracts resulting from this RFP.

Program Cost Reimbursement

Partner4Work plans to make funds for any agreement resulting from this RFP available on a cost reimbursement basis. This means your organization must have the financial capacity to pay all program costs up front. Partner4Work will require an invoice, proof of expenses, and required documentation to process a reimbursement. Partner4Work will only reimburse the provider for actual expenses incurred during the effective dates of the contract. The reimbursement timeline will be finalized during the contract negotiation. Allowable costs will be determined by all applicable federal, state and local regulations.

Bidders must have financial management, accounting, and cost-tracking systems sufficient to identify, document, and support all costs charged under the contract. Such systems must be capable of producing accurate, complete, and verifiable records needed to support invoicing and reimbursement under a cost reimbursement contract model.

Invoicing must be submitted to Partner4Work monthly. The successful bidder must also be up-to-date with all PA CareerLink® reporting and documentation requirements in order to receive payment, as applicable.

Partner4Work reserves the right to alter payment methodology (e.g., cost reimbursement) for any agreement resulting from this RFP, either before initial award or for subsequent contract periods. If Partner4Work chooses to consider a different payment methodology, Partner4Work will discuss and consult with the selected bidder.

2. Statement of Work

This Statement of Work (SOW) describes the programmatic and administrative requirements applicable to any contract resulting from this RFP, referred to as “Agreement” below. The successful bidder, referred to as “SUBRECIPIENT” below, will be required to comply with all standards described in the SOW. Partner4Work has applied its best efforts to create a descriptive SOW that reflects requirements likely to appear in an agreement; however, the final SOW for an awarded proposal may vary, based on bidder proposals and discussions, or other factors at the discretion of Partner4Work.

1. Summary

SUBRECIPIENT will implement the BankWork\$® program in the Pittsburgh area through an innovative and proven approach to training and workforce development model, driven by the needs of employers and availability of career opportunities. The proposed model must align with the standards of the BankWork\$® program, principles and requirements of the Workforce Innovation and Opportunity Act (WIOA), and the PARTNER4WORK vision of a world-class workforce development system, the primary goal of which is to match the labor demands of employers with the skills and talents of jobseekers, helping businesses thrive and creating viable career pathways for residents of Pittsburgh and Allegheny County.

SUBRECIPIENT will train a minimum of 60 individuals during the term of this Agreement, offering 4 cohorts of at least 15 individuals each. A standard cohort for the BankWork\$® program consists of 15 individuals and is offered on a quarterly basis.

2. Relationship to Licensing Partners

PARTNER4WORK is the licensed provider of the BankWork\$® program in the Pittsburgh region. SUBRECIPIENT acknowledges that all BankWork\$® related materials, know-how, and trademarks are the intellectual property of CareerWork\$. SUBRECIPIENT will assist PARTNER4WORK in adhering to the requirements established in the Program License Agreement between CareerWork\$ and PARTNER4WORK. SUBRECIPIENT further acknowledges the role of the Pennsylvania Bankers Association as the official industry champion for BankWork\$® affiliate programs in Pennsylvania and will assist PARTNER4WORK in adhering to the requirements established in the Partnership Agreement between CareerWork\$, Pennsylvania Bankers Association, and PARTNER4WORK.

SUBRECIPIENT will ensure the timely submission of data, outcomes, enrollment plans, class schedules, and other information requested by PARTNER4WORK and/or CareerWork\$. Throughout the term of this Agreement, PARTNER4WORK, CareerWork\$, and the Pennsylvania Bankers Association will have the right to conduct on-site visits at SUBRECIPIENT’s location to review SUBRECIPIENT’s execution of the program (including sitting in on actual training sessions) and to verify SUBRECIPIENT’s compliance with the terms of this Agreement. Should the program end prematurely, SUBRECIPIENT and all involved staff will work to promptly cease all use of program materials and destroy any remaining copies.

3. Targeted Populations Served, Geography, and Location of Services

Eligible and suitable candidates include individuals who:

- are age 18 or older;
- possess a high school diploma or GED;
- have a 9th grade level reading and math proficiency;
- are unemployed or underemployed in low-income communities, and/or facing other barriers to employment;
- demonstrate a strong motivation to work in retail banking in a customer-facing role and the ability to succeed in such a role with support provided by the BankWork\$® program; and
- are eligible to work in a financial institution (e.g., have a PA criminal background check free of theft, fraud, or other offenses which disqualify an individual for work in a retail bank).

Highly-qualified candidates include individuals who meet the above criteria and have some experience working in

customer-facing roles (e.g., employed in retail/hospitality sector or in an occupation involving customer service or significant volunteer experience that involved similar skills); however, participants may not be disqualified due to a lack of work history in customer service.

Participant screening, intake, training, graduation, job fairs, and other program-related events will take place at a location agreed upon in writing by PARTNER4WORK and SUBRECIPIENT. SUBRECIPIENT is encouraged to develop partnerships throughout Allegheny County to screen and enroll potential participants. SUBRECIPIENT may screen and enroll participants virtually with the approval of PARTNER4WORK.

Based on request by PARTNER4WORK, SUBRECIPIENT may facilitate the BankWork\$[®] program in community locations determined by PARTNER4WORK.

SUBRECIPIENT will make diligent efforts to enroll participants from programs within PARTNER4WORK's network of contracted workforce development programs, including but not limited to PA CareerLink[®], WIOA Adult, Dislocated Worker, and Youth Programs, the Employment Assistance and Retention Network (EARN), SNAP Job Experience Training and Support, and Work Ready.

4. Operations and Staffing

SUBRECIPIENT will provide administrative and operational capacity, staffing, and classroom and event space to administer an effective BankWork\$[®] program.

SUBRECIPIENT must employ highly qualified and professional staff at all levels throughout the period of performance whose quality of work is reflective of the world-class workforce development system sought by PARTNER4WORK. SUBRECIPIENT will ensure all staff adhere to the highest level of professional conduct, demonstrating professionalism and responsiveness at every level of interaction with customers, PARTNER4WORK staff, and other stakeholders. SUBRECIPIENT staff are required to maintain current knowledge and expertise in the following:

- ∄ Career counseling and customer service best practices
- ∄ Delivery of workforce services to job seekers and businesses remotely, through virtual platforms
- ∄ Labor market information, including characteristics of supply (labor) and demand (employers)
- ∄ Initiatives, programs, and services of PARTNER4WORK and the broader workforce development system
- ∄ Viable career pathways and how to connect with PA CareerLink[®] appropriately
- ∄ Impact of trauma and poverty on jobseekers and related interpersonal strategies
- ∄ Local resources and services to assist individuals facing barriers to employment
- ∄ Culturally competent service delivery
- ∄ Federal, state, and local policies, including WIOA and its implementing guidance

SUBRECIPIENT may utilize a staffing model it deems effective to meet the requirements described herein, subject to review and approval by PARTNER4WORK. At a minimum, and in alignment with standards of the BankWork\$[®] program, SUBRECIPIENT will recruit and employ both a BankWork\$[®] Instructor ("Instructor") and BankWork\$[®] Career Navigator ("Career Navigator") to lead screening, enrollment, instruction, coaching, and job placement activities. SUBRECIPIENT grants PARTNER4WORK and CareerWork\$, the right to participate in the selection of BankWork\$[®] Instructor and Career Navigator.

The Career Navigator should have at least three years of experience in employment services, human resources, social services or another related field; preferably with experience in retail banking. The responsibilities of the position will include coaching and supporting participants as they develop job skills, conducting a post-completion follow-up effort focused on supporting program participants, collaboratively engaging in outreach and recruiting with the BankWork\$[®] Instructor, and working with the BankWork\$[®] national team to update the curriculum and other practices as necessary. SUBRECIPIENT will ensure the Career Navigator meets the criteria established in Appendix E, BankWork\$[®] Position Descriptions.

The Instructor should have a Bachelor's degree or equivalent professional experience, at least five years of experience working in retail banking, and at least three years of professional adult training experience. The responsibilities of the position will include the recruitment and assessment of new participants, instruction in the operational fundamentals of branch banking, individual and group job support coaching, and the management and collection of all data related to the program. SUBRECIPIENT will ensure the Instructor meets the criteria established in Appendix E, BankWork\$® Position Descriptions. PARTNER4WORK anticipates that the Instructor will be a full-time employee of SUBRECIPIENT.

New Instructors and Career Navigators must attend Train-the-Trainer sessions led by CareerWork\$.

Subject to review and approval by PARTNER4WORK, the BankWork\$® program positions defined in this section may be adjusted or customized by SUBRECIPIENT to meet the needs and standards of SUBRECIPIENT.

5. Promotion, Outreach and Recruitment

SUBRECIPIENT must coordinate closely with PARTNER4WORK in marketing and promotional implementation strategies. PARTNER4WORK will oversee the overall BankWork\$® Pittsburgh marketing and promotion strategy facilitated by SUBRECIPIENT. SUBRECIPIENT will implement a timeline, marketing collateral, and a website for interested candidates and employers to provide basic contact information.

SUBRECIPIENT will promote the BankWork\$® program utilizing marketing collateral approved by PARTNER4WORK and CareerWork\$. All collateral must be approved by PARTNER4WORK and CareerWork\$ prior to public distribution, as per the requirements of PARTNER4WORK's licensing agreement with CareerWork\$.

SUBRECIPIENT will include information about the BankWork\$® program on its website, post and distribute flyers and/or other approved collateral, and advertise about upcoming cohorts utilizing its social media platforms. SUBRECIPIENT may produce and post original social media content (e.g., Facebook posts, Tweets, etc.) to support recruitment efforts; however, PARTNER4WORK reserves the right to impose edits and/or deletion if content does not appropriately represent BankWork\$® Pittsburgh, PARTNER4WORK, or CareerWork\$. At all times, SUBRECIPIENT will adhere to the marketing and branding guidelines and approval process established by PARTNER4WORK.

SUBRECIPIENT will actively recruit qualified participants leveraging its own network of community partners as well as referrals from PARTNER4WORK, PA CareerLink®, WIOA and TANF-funded programs, and other workforce development and community-based programs throughout the region. SUBRECIPIENT will organize information sessions and pre-screening events throughout Allegheny County to promote the BankWork\$® program. Additionally, SUBRECIPIENT agrees to participate in other events organized by PARTNER4WORK and/or PA CareerLink® to promote BankWork\$® Pittsburgh.

Should PARTNER4WORK receive inquiries from interested candidates, PARTNER4WORK will send inquiries to SUBRECIPIENT, at which point SUBRECIPIENT will respond to the candidate with current and accurate information regarding program eligibility, the application and screening process, and upcoming training cohorts, as well as answering general questions about the BankWork\$® program. SUBRECIPIENT is expected to respond to all inquiries, whether from PARTNER4WORK or other referral sources, including self-referral, within two standard business days of receipt.

SUBRECIPIENT will direct all media, press, and public relationships inquiries regarding BankWork\$® Pittsburgh to PARTNER4WORK.

6. Screening and Assessment

SUBRECIPIENT will implement a triage and assessment process to determine eligibility and suitability for programming and will enroll only those individuals for whom this programming is appropriate. Refer to Section 3 above for a list of eligibility criteria. SUBRECIPIENT will align its screening and assessment process with the criteria and guidelines established by CareerWork\$ and PARTNER4WORK.

Prior to each training cohort, SUBRECIPIENT will host participant screening days during which SUBRECIPIENT will collect

intake applications, conduct interviews, and administer TABE tests to all candidates, either directly or through partnerships with approved TABE providers. Where a participant has taken the TABE test in the past six months, SUBRECIPIENT is encouraged to utilize the TABE test results. SUBRECIPIENT will maintain records for all BankWork\$® applicants including all intake forms completed, interview notes, test scores, and outcome of screening (e.g., approval, denial, or addition to waitlist; referrals to other programs or services; etc.). SUBRECIPIENT will conduct criminal and other background or credit checks on all participants prior to enrollment in the training program, as defined by PARTNER4WORK.

SUBRECIPIENT will further ensure that applicants not eligible or suitable for this programming are referred to other appropriate programs for further assessment and services, including PA CareerLink®.

For candidates who are job-ready and may be overqualified for BankWork\$® training, SUBRECIPIENT will coordinate with partner agencies, including PA CareerLink®, to directly place them into employment with local banks, as appropriate.

PARTNER4WORK may provide specific target populations for enrollment to SUBRECIPIENT prior to or during the enrollment period (SNAP recipients, participants between 18-24 years old, etc.). In these cases, SUBRECIPIENT is expected to work closely with PARTNER4WORK to increase outreach efforts to priority populations.

7. WIOA Enrollment via PA CareerLink®

SUBRECIPIENT may be required to facilitate enrollment of eligible participants in services that are funded and governed by the Workforce Innovation and Opportunity Act (WIOA), and other publicly funded workforce development services or programs, in close coordination with PA CareerLink®. PARTNER4WORK may make participation in the BankWork\$® program contingent upon WIOA enrollment for some or all participants.

When WIOA enrollment is required, PA CareerLink® will define all pre-enrollment steps, forms, and eligibility documentation required of SUBRECIPIENT and potential participants, which must be completed or collected within the timeframes defined by PA CareerLink® before PA CareerLink® conducts eligibility and suitability activities with potential participants. SUBRECIPIENT will work with PA CareerLink® to schedule WIOA eligibility and enrollment interviews for potential participants, as needed, to ensure such participants are eligible for WIOA services and suitable to participate in WIOA-funded training; and to ensure all required WIOA enrollment procedures are followed and participant information is entered into the PA CareerLink® system and the Commonwealth Workforce Development System (CWDS) in a timely manner. PA CareerLink® may also need to take additional steps to ensure participants are suitable for WIOA-funded training, including but not limited to completing specialized assessments or an Individual Employment Plan (IEP).

PA CareerLink® may choose to conduct eligibility and enrollment activities with potential participants in a group or individual format, through in-person or remote platforms. SUBRECIPIENT will make every effort to ensure arrangements are made with PA CareerLink® to conduct eligibility and suitability activities no later than ten (10) business days before the start of each training cohort for potential participants to be enrolled in WIOA.

If SUBRECIPIENT does not strictly abide by these requirements, or any additional requirements defined by PA CareerLink®, PA CareerLink® may not be able to effectively determine eligibility and suitability for potential participants.

Final WIOA eligibility and suitability determinations for participants will be made by staff members of PA CareerLink®, or other entities designated by PARTNER4WORK.

8. Training and Graduation Event

SUBRECIPIENT will deliver the BankWork\$® program at a location agreed upon in writing by PARTNER4WORK and SUBRECIPIENT. Upon request by PARTNER4WORK, SUBRECIPIENT will deliver the BankWork\$® program at locations determined by PARTNER4WORK. Cohort start dates for the period of performance described herein are to be determined by mutual agreement of PARTNER4WORK and SUBRECIPIENT.

SUBRECIPIENT will utilize the BankWork\$® curriculum to teach program participants the operational fundamentals of

branch banking, the features and benefits of bank products and services, strong customer service and client engagement skills, and bank product/service sales and internal referral skills. Each training cohort will be eight weeks long and offered three days per week, enabling participants with part-time jobs to maintain employment throughout the program. SUBRECIPIENT will provide dedicated, consistent classroom space, instructional materials and audio-visual equipment, and regular access to on-site computers for the duration of each cohort.

SUBRECIPIENT will work closely with PARTNER4WORK to determine the end dates and graduation date for each cohort. Training will be delivered by the Instructor and co-facilitated by the Career Navigator; therefore, it is expected that both the Instructor and the Career Navigator will actively participate in all class sessions. SUBRECIPIENT will ensure adequate staff coverage for each class if either the Instructor or Career Navigator are absent. Should class be modified or canceled due to staff absences, inclement weather, or any other reason, SUBRECIPIENT will immediately notify all participants and PARTNER4WORK via phone and email. SUBRECIPIENT will ensure any canceled classes are promptly rescheduled and communicated to participants and PARTNER4WORK. SUBRECIPIENT will track participant attendance and completion.

SUBRECIPIENT will maintain constant fidelity to the BankWork\$[®] program. SUBRECIPIENT may supplement the BankWork\$[®] curriculum with additional learning content pending prior written approval by PARTNER4WORK. Additional content may be used to reinforce key concepts covered in the BankWork\$[®] program and may never be used to substitute, replace or contradict components of the BankWork\$[®] curriculum.

At the culmination of each training cohort, SUBRECIPIENT will organize and execute a combined graduation event and job fair, working in close coordination with PARTNER4WORK (see “Employer Engagement” below). SUBRECIPIENT will provide suitable space, staffing, and logistical support to ensure a successful event.

SUBRECIPIENT will maintain records of individual participants’ attendance at each scheduled day of training using daily sign-in sheets. Additionally, SUBRECIPIENT will maintain records of participant and employer attendance at the BankWork\$[®] graduation/job fair events.

9. Supportive Services

For each applicant enrolled in BankWork\$[®], SUBRECIPIENT will conduct an initial needs assessment that will identify potential barriers to program completion, job placement, and retention. SUBRECIPIENT will then meet with each participant with identified barriers to create a supportive service plan. SUBRECIPIENT will offer a bus pass or gas money to each participant, based on individual needs, for the duration of the 8-week training program. SUBRECIPIENT will make all reasonable accommodations to ensure full access to the program for participants with disabilities or impairments. SUBRECIPIENT will track supportive services offered and provided to participants, as well as referrals made by SUBRECIPIENT to community resources. SUBRECIPIENT will provide supporting documentation to verify supportive services provided.

SUBRECIPIENT may provide stipends to participants, as long as amounts are clearly established in the budget for this Agreement and internal controls are established to ensure effective distribution and tracking.

SUBRECIPIENT will provide ongoing, customized one-on-one life skills/soft skills coaching and workshops designed to reinforce and supplement the BankWork\$[®] curriculum and to enhance participant’s work readiness. These services may include, but are not limited to, resume writing, mock interviewing, time management, financial literacy, and creating individual plans for post-employment success, such as creating contingency plans for transportation or childcare.

10. Job Placement and Follow-Up Services

SUBRECIPIENT will provide all participants with job search information including assistance completing on-line applications to individual banks, and will provide intensive support and coaching to participants who prove difficult to place. SUBRECIPIENT will work closely with PARTNER4WORK to build and enhance relationships with bank partner recruiters and promote candidacy of program participants to partner banks.

SUBRECIPIENT will assist all BankWork\$® graduates with job searching toward the goal of placing job-ready candidates directly into employment with local banks. For those individuals unable to complete the program, SUBRECIPIENT will refer them to PA CareerLink® for further job search assistance. For those individuals unable to find a job within two weeks of program graduation, SUBRECIPIENT will coordinate with PA CareerLink® to provide additional job search assistance, as appropriate.

SUBRECIPIENT will provide follow-up services to all participants who complete the BankWork\$® program for one year following their date of graduation. SUBRECIPIENT will conduct a structured participant follow-up effort by reaching out to placed program participants to monitor and document their progress and provide support to both participants and their employers. SUBRECIPIENT will produce regular reports indicating participant retention and career and salary progression.

11. Employer Engagement

PARTNER4WORK is developing an employer engagement model for the financial services sector, bringing together banks, credit unions, and other financial services employers with operations in Pittsburgh/Allegheny County to address workforce needs and create talent pathways. The BankWork\$® program is a foundational initiative within this employer engagement strategy.

SUBRECIPIENT will actively collaborate with PARTNER4WORK's Business Engagement Office to build and sustain relationships with employer partners. This includes participating in employer convenings to discuss program performance, workforce trends, and opportunities to strengthen hiring pipelines. SUBRECIPIENT is expected to contribute to the development of a sustainable employer partnership model, where possible.

PARTNER4WORK and SUBRECIPIENT will coordinate closely to promote the BankWork\$® program to employers in the region and meet with employers to identify their interest and capacity to participate in the BankWork\$® program, and to secure employers' engagement through activities such as guest lectures, mock interview sessions, and attendance at graduation/job fair events. PARTNER4WORK and SUBRECIPIENT will collect employer feedback on the BankWork\$® program and will share findings and recommendations to guide future performance.

PARTNER4WORK recognizes that SUBRECIPIENT brings existing relationships with businesses in the financial services sector that may enhance and expand opportunities for BankWork\$® participants. To ensure a coordinated approach to employer engagement around BankWork\$®, SUBRECIPIENT agrees to participate in regular meetings with PARTNER4WORK to review business leads and manage employer relationships. Additionally, SUBRECIPIENT will refer interested employers to PARTNER4WORK for an initial consultation meeting to establish that employer's hiring needs, interest in participating in BankWork\$®, and interest in participating in the broader Financial Services Industry work.

12. Communication

SUBRECIPIENT will communicate regularly, through meetings and correspondence, with PARTNER4WORK and PA CareerLink® regarding program accomplishments, challenges, and lessons learned. SUBRECIPIENT will hold monthly meetings with PARTNER4WORK and PA CareerLink® to assess progress, problem solve, and refine program implementation.

13. Outcomes

SUBRECIPIENT must meet or exceed the following goals during the term of any agreement resulting from this RFP.

Performance Indicator	Goal
Number of cohorts conducted during the period of July 1, 2026 to June 31, 2027.	4 total (1 per quarter)
Number of participants enrolled per cohort.	15
Number of total participants enrolled during the period of July 1, 2026 to June 31, 2027.	60

Percent of participants who complete the program.	85% of enrollments
Percent of participants who obtain employment within six months of graduation	80% of enrollments
Percent of participants who obtain employment in the financial services industry within six months of graduation	70% of enrollments
Percent of participants who retain employment for six months	70% of participants placed in employment
Percent of participants who retain employment for twelve months	50% of participants placed in employment

PARTNER4WORK reserves the right to add any additional goals for SUBRECIPIENT.

Poor Performance: In the event SUBRECIPIENT's performance does not result in the contract goals, PARTNER4WORK will work with SUBRECIPIENT to improve performance; however, especially in cases of chronic underperformance, PARTNER4WORK may implement corrective measures or terminate any agreement resulting from this RFP upon notice to SUBRECIPIENT.

14. Data Collection and Reporting

SUBRECIPIENT must regularly track and monitor data related to participation and outcomes, using observations and evaluations to ensure continuous program improvement. Such efforts must be supported by strong internal systems and applications. SUBRECIPIENT is required to provide PARTNER4WORK with timely reports and supporting documentation that clearly demonstrate program enrollment, participation, progress, outputs, and outcomes. PARTNER4WORK will work with SUBRECIPIENT to understand reporting requirements and program exiting procedures, and to determine the appropriate template for reporting outcomes and performance. Reporting frequency and content are subject to change at the discretion of PARTNER4WORK. SUBRECIPIENT may be required to utilize a reporting system or template proprietary to the BankWork\$® program.

15. Records and Documentation

SUBRECIPIENT must retain, secure and ensure the accuracy of all program files and records, whether related to participants, businesses or general operations, in compliance with federal and state regulations, and PARTNER4WORK's record retention requirements. Case files are the property of PARTNER4WORK and must contain a variety of documentation including, but not limited to: BankWork\$® application form, proof of age (e.g., birth certificate, state-issued ID, etc.), documentation of current address (e.g., state-issued ID, utility statement, postmarked mail, etc.), authorization to work in the United States (e.g., US Passport or state-issued ID, permanent residence card, etc.), criminal background records, TABE test results, any assessments conducted, regular customer contacts and updates, progress reports, time and attendance sheets, case notes, and, upon graduation from the program, a BankWork\$® program completion certificate. Files must be retained for three (3) years after final expenditures are reported to the primary funding source. SUBRECIPIENT must allow PARTNER4WORK and representatives of other regulatory authorities access to all records, program materials, staff, and participants.

SUBRECIPIENT is responsible for maintaining and securing participant case files at all times, as well as ensuring privacy and protection of all personal information collected from participants per applicable laws, regulations and PARTNER4WORK policies. Confidentiality of participant information must be maintained, and all case files must be properly stored in a secured space with limited staff access. Each staff member who has contact with participants or participant information must receive training on confidentiality requirements. SUBRECIPIENT acknowledges that the use or disclosure of participant information for purposes other than the effective delivery of the services described in this STATEMENT OF WORK is strictly prohibited. Staff of SUBRECIPIENT may have access to this information only on a "need to know" basis. SUBRECIPIENT must inform employees that inappropriate use of such information may result in disciplinary action,

including discharge, or criminal prosecution if the employee knowingly uses the information for fraudulent purposes.

16. Contract Oversight and Evaluation

PARTNER4WORK is responsible for all levels of program monitoring, compliance and evaluation for the services delivered through this Agreement. SUBRECIPIENT will be required to keep good records and collect data that will help PARTNER4WORK comply with such requirements and sustain highly effective workforce development programming.

PARTNER4WORK Responsibilities: PARTNER4WORK will monitor, evaluate and provide guidance and direction to SUBRECIPIENT in the conduct of services performed under this STATEMENT OF WORK. PARTNER4WORK has the responsibility to determine whether SUBRECIPIENT has spent funds in accordance with applicable laws and regulations, including federal audit requirements and will monitor the activities of SUBRECIPIENT to ensure such requirements are met. PARTNER4WORK may require SUBRECIPIENT to take corrective action if deficiencies are found.

SUBRECIPIENT Responsibilities: SUBRECIPIENT will permit PARTNER4WORK to carry out monitoring and evaluation activities, including any performance measurement system required by applicable law, regulation, and funding source guidelines, and SUBRECIPIENT agrees to ensure, to the greatest extent possible, the cooperation of its agents, employees and board members in such monitoring and evaluation efforts. This provision shall survive the expiration or termination of any agreement resulting from this RFP.

SUBRECIPIENT shall cooperate fully with any reviews or audits of the activities under any agreement resulting from this STATEMENT OF WORK by authorized representatives of PARTNER4WORK or federal or state agencies and SUBRECIPIENT agrees to ensure to the extent possible the cooperation of its agents, employees and board members in any such reviews and audits. This provision shall survive the expiration or termination of any agreement resulting from this RFP.

SUBRECIPIENT understands that all books and records pertaining to any agreement resulting from this RFP, including payroll and attendance records of participating employees, are subject to inspection by PARTNER4WORK, federal or state agencies and others for auditing, monitoring or investigating activities. Said books and records shall be maintained for a period of SEVEN (7) years beyond the completion of any agreement resulting from this RFP. If SUBRECIPIENT receives notice of any litigation or claim involving any agreement resulting from this RFP, SUBRECIPIENT shall retain records until otherwise instructed by PARTNER4WORK.

3. Proposal Requirements and Process

This section provides instructions for preparing and submitting a proposal in response to this RFP, including required proposal content and format, important dates and deadlines, and how to find out more about the RFP. Before preparing and submitting a proposal, interested and qualified applicants are highly encouraged to read all other sections of this RFP and key source documents referenced throughout to gain a full understanding of the services requested and respondent characteristics and competencies sought.

How to Apply

Interested and qualified applicants must submit proposals by May 15, 2026 at 11:59pm ET to RFP@partner4work.org. Emails must have the subject line "BankWork\$ Proposal [Organization name]." Partner4Work reserves the right, in its sole discretion, to reject any late or incomplete proposal as non-responsive. Proposals must be submitted in 11-point, Calibri font, double-spaced with 1-inch page margins. Your proposal may not be considered if page limitations and formatting requirements are not met. Your proposal must contain all the content below in the same general order presented. Strong proposals will demonstrate a full understanding of the requirements described throughout this RFP and establish the capacity, expertise, and design needed to meet the required standards and goals.

1. Coversheet
2. Executive Summary
3. Organization Description
4. Program Narrative
5. Program Costs/Budget
6. Budget Narrative
7. Attachments

1. **Cover Sheet** – Use template provided. (See Partner4Work’s webpage for this RFP)
2. **Executive Summary** – Include each of the following: (maximum 2 pages)
 - a. Overview of the organization’s qualifications and alignment with the services sought by this RFP.
 - b. Concise description of the proposed program.
 - c. The total amount of funding requested.
3. **Organization Description** – Describe each of the following for your organization: (maximum 2 pages)
 - a. Basic organizational description, including but not limited to year established, legal status, mission, principal programs and services, executive leadership, annual budget, and number of full-time staff.
 - b. Past experience in managing quality training and workforce development programs, especially those similar to the program described in this procurement, including related performance outcomes. Provide contact information for at least two past or current funders (other than Partner4Work) who can directly attest to the work you describe and verify your ability to serve customers, achieve deliverables, and meet performance goals similar to those required by this RFP. Partner4Work reserves the right to consider any previous performance data from workforce development programs.
 - c. Administrative and fiscal capacity, including but not limited to your organization’s proven ability to provide fiscal support and oversight, utilize information systems, manage resources and personnel, and produce timely and accurate program reports.
4. **Program Narrative** – (maximum 6 pages)

Applicants should directly respond to each of the sections below; however, strong responses will clearly demonstrate how the applicant will effectively meet all the standards, expectations, and outcomes found in this RFP. Proposals should outline the strategy proposed to meet the requirements described throughout this RFP.

- a. Staffing plan: Describe your proposed staffing plan to support the programmatic, administrative, and executive components of the BankWork\$[®] program. You may propose the staffing model you deem effective to meet the requirements described herein; however, your model must reflect the standards of the BankWork\$[®] program, as described throughout this RFP. In your response, be sure to address how you will accomplish the following:
 - i. Coordinate with Partner4Work to recruit and employ highly qualified candidates for the BankWork\$[®] Program, including the Instructor and Career Navigator. Note: if your organization plans to designate an existing staff person as the Career Navigator or Program Instructor, you must attach a resume for that individual.
 - ii. Staffing plan for key positions supporting the BankWork\$[®] program, including titles, basic roles, responsibilities, and level of effort. Be sure to address how you will employ professional staff with the knowledge and expertise in the Statement of Work, and ensure a high level of staff performance, competency, and quality customer service. Partner4Work encourages applicants to ensure all staff members employed through any agreements resulting from this RFP receive a salary or wage of at least the Partner4Work self-sufficiency wage.
 - iii. Maintain regular and clear communication between proposed staff and Partner4Work.
 - iv. Describe how your organization will ensure sufficient staffing capacity to support effective program delivery. If applicable, identify any known or anticipated staffing changes, vacancies, or constraints that could affect implementation of the proposed program and describe strategies to mitigate any potential disruption to program delivery.
- b. Performance goals: Describe how your proposed program will meet the performance standards required by this RFP. At a minimum, proposals must include strategies for meeting the goals described in the Statement of Work, including number of cohorts, participants enrolled, completion of the program, and job placement. However, strong proposals will include additional goals set by applicants reflecting the standards and desired outcomes described in this RFP. Also, be sure to address how you will track performance and regularly communicate progress. If you are a provider who has not met performance goals of any prior Partner4Work contracts, address how you will ensure goals are met for this program.
- c. Outreach, recruitment, and screening: Describe your proposed strategies for reaching the populations described in this RFP and building an effective pipeline of training candidates. Strong responses will demonstrate the applicant's success in recruiting and serving the populations described in this RFP. Your response should clearly address each of the following components:
 - i. Outreach and communications strategy to support recruitment of diverse individuals who are underrepresented in the banking sector, including those with barriers to employment.
 - ii. Screening process, including how you will assess interested participants to ensure BankWork\$[®] training is a strong fit and that candidates are likely to be successful in the program.
 - iii. Coordination of outreach and communications efforts with Partner4Work and other workforce development partners, such as PA CareerLink[®].
Note: Although Partner4Work, PA CareerLink[®], and other workforce development partners will promote and recruit for the program, it will be the responsibility of the successful applicant to reach enrollment and other goals of the contract.
- d. Program delivery: Describe your plan for delivering a BankWork\$[®] program that meets the standards and requirements described throughout this RFP. Your response should include the following:
 - i. Proposed training locations, including characteristics of the space, and how location and space will provide access and support effective participation. Preference will be given to proposals that demonstrate effective strategies for delivering programs remotely or in neighborhood-based locations, and for proposals providing location flexibility. Be sure to include specific details about locations, accessibility for individuals with disabilities, and proximity to public transit routes.

- ii. Plan for delivering high quality, engaging, hands-on training that aligns with BankWork\$® curriculum and program standards. See Appendix F for an overview of the BankWork\$® curriculum.
 - iii. Plan for identifying employer trends and banking practices. Your response should indicate how your organization will stay up to date with emerging industry trends, coordinating with Partner4Work and CareerWork\$ to ensure training continues to meet employer needs.
 - iv. Plan for eliminating barriers to participation for trainees, including strategies for assessing and meeting supportive service needs. You may propose providing stipends for participants, as long as amounts and arrangements are reasonable and well justified.
 - v. Plan for delivering comprehensive career services tailored to the financial service industry, including a range of activities designed to help participants successfully prepare for job placement in the banking sector. Your response should address how your organization is prepared to help participants develop soft skills and specific occupational skills.
 - vi. How you will ensure quality job placement for participants of the program. Preference will be given to proposals that include evidence of employer commitment to hire individuals who have participated in the applicant's programming, which can be demonstrated with employer MOUs or letters of support. Quality of job placement, in terms of wages, benefits, stability, advancement potential, and other factors will also be considered.
 - vii. How you will provide follow-up services to support retention and advancement, mediate workplace issues, and address identified needs.
- e. Any other factors Partner4Work should consider in evaluating the strength of the proposal, including but not limited to additional services or resources available to participants, key partnerships providing value to BankWork\$®, or technologies enhancing the proposed program.

5. **Program Costs/Budget** – Provide a budget including all program and administrative costs, using the required budget template provided (see Partner4Work webpage for this RFP). Reference *Anticipated Award* in Section 1 of this RFP for a range of possible contract values.

All costs must be allowable according to applicable federal, state and local regulations, including but not limited to the Uniform Guidance and regulations of the funding source(s), and allocable to the proposed program. Effective budgets will enable the proposed program to meet the requirements of the contract, while being realistic and reasonable, avoiding unnecessary or unusual expenditures. Refer to the appropriate regulations per the funding sources described in this RFP in conjunction with the Uniform Guidance to identify disallowed costs associated with this grant. See Appendix C for further guidance regarding the budget and budget narrative.

6. **Budget Narrative** (maximum 2 pages) – Provide a narrative to accompany the budget that describes the purpose of each cost, explains how all costs were estimated, and justifies the need for all costs in meeting contract requirements. In your narrative, be sure to clearly communicate the calculation for staff, supportive services, space, equipment, general operations, technology, administration, indirect and any other necessary costs, as applicable. Please also clearly indicate your proposed cost per participant, i.e., the total cost of your proposed program for the anticipated contract period divided by the number of participants served during the same period. A strong budget narrative will minimize or eliminate the need for clarifications from evaluators reading the proposal. See Appendix B for further guidance regarding the budget and budget narrative. If your proposal includes in-kind services or donations, including cash contributions, fee-for-service or other revenue generation, or any other leveraged resources, use the budget narrative to describe the actual or estimated value of such contributions. If applicable, also attach a letter of support from any organization providing leveraged resources in support of your proposal.
7. **Attachments** - Required attachments include contact information for at least two past or current funders (see *Organization Description*). MOUs or letters of support from employers are highly encouraged (see *Program Narrative, Program Delivery*). You may choose to include other attachments with your proposal; however, all

attachments must specifically relate to your proposal. Examples include letters of support from important partners, a timeline or flowchart for your proposal, or a table illustrating past performance. Proposal readers may consider optional attachments in evaluating the proposed program, to the extent they are directly relevant to and strengthen the content of your proposal, as described herein. Attachments containing general information not directly relevant to the proposed program will not be considered. Attachments will not count toward the page limitations established in the above sections.

Review and Selection Process

All responsive proposals received by the submission deadline will be initially reviewed by Partner4Work for completeness and compliance with this RFP. Proposals passing the initial review will be scored by qualified evaluators according to the criteria below, with attention to clarity and quality. High scoring proposals will clearly demonstrate an ability and likelihood to effectively perform the work and meet the standards and objectives of this RFP. Select applicants may be requested to participate in presentations or discussions with proposal evaluators and other Partner4Work staff.

The selected applicant(s) will be invited to negotiate a contract based on the selected proposal(s) and stipulations of the funding source. Final contracts are subject to successful negotiation, availability of funding, and other factors.

Pre-Award Assessment: As part of the procurement process, Partner4Work conducts a pre-award review of each applicant’s organizational, fiscal, and administrative capacity to ensure readiness to manage public funds and perform the work described in this RFP. Information provided in response to the proposal requirements—including organizational experience, past performance, staffing capacity, administrative systems, and financial management practices—will be used not only to evaluate programmatic merit, but also to inform Partner4Work’s assessment of responsibility and pre-award risk. Pre-award risk considerations may influence award decisions, contract negotiations, funding levels, or the inclusion of special conditions in any resulting agreement.

Scoring for the required sections of the proposal will be assigned as follows:

Proposal Review Scoring Rubric	
<i>1 & 2. Cover Sheet and Executive Summary</i>	<i>Required, but not directly scored</i>
<i>3. Organization Description</i>	<i>20 points</i>
<i>4. Program Narrative</i>	<i>60 points</i>
<i>5. & 6. Program Costs</i>	<i>20 points</i>
<i>7. Attachments</i>	<i>Used to support scores of related proposal sections</i>
Total points available	100 points

Review and Selection Timeline

All dates below are subject to change at Partner4Work’s discretion. Timeframes for proposal evaluation and notification of results are estimations provided for informational purposes only and may change without notification to bidders.

Release of RFP	April 14, 2026
Due date – all questions regarding this RFP	May 1, 2026, at 11:59pm ET
Due date – proposal submission	May 15, 2026, at 11:59pm ET
Proposal evaluation timeframe (estimated)	May 2026
Notification of results (estimated)	June 2026

Questions

All questions or requests for additional information regarding this RFP must be made in writing to RFP@partner4work.org by May 1, 2026, at 11:59pm ET. Emails must have the subject line "BankWork\$ Questions [Organization name]." Answers will be posted publicly at www.partner4work.org. Interested parties are encouraged to check the website frequently for updates. Partner4Work reserves the right not to answer questions received after May 1, 2026, at 11:59pm ET.

Appendix A – RFP Cover Sheet

Visit Partner4Work’s webpage for this RFP to access the Cover Sheet required for all proposals.

Appendix B – Administrative Requirements

Overview of Administrative Requirements

At a minimum, all subrecipient organizations must meet the standards for uniform administrative requirements, cost principles, and audit requirements found at 2 CFR 200 (Uniform Guidance), as well as any regulatory requirements related to the funds. Your organization's financial management system must provide for the following:

1. Tracking spending on multiple individual funding streams. Identification, in its accounts, of all Federal awards received and expended and the Federal programs under which they were received. Federal program and Federal award identification must include, as applicable, the CFDA title and number, Federal award identification number and year, name of the Federal Agency, and name of the pass-through entity (i.e., Partner4Work).
2. Fiscal reporting on an accrual basis. Accurate, current, and complete disclosure of the financial results of each Federal award or program in accordance with the reporting requirements set forth in 2 CFR 200.328 Financial Reporting and 200.329 Monitoring and Reporting Program Performance. If a Federal awarding agency requires reporting on an accrual basis (2 CFR 200.302) from a recipient that maintains its records on other than an accrual basis, the recipient may develop accrual data for its reports on the basis of an analysis of the documentation on hand. Similarly, a pass-through entity must not require a subrecipient to establish an accrual accounting system and must allow the subrecipient to develop accrual data for its reports on the basis of an analysis of the documentation on hand.
3. Maintaining documentation supporting all spending and assets. Records that identify adequately the source and application of funds for federally funded activities. These records must contain information pertaining to Federal awards, authorizations, obligation, unobligated balances, assets, expenditures, income and interest, and be supported by source documentation.
4. Maintaining internal controls that ensure compliance with all funding regulations. Control over, and accountability for, all funds, property, and other assets. The non-Federal entity must adequately safeguard all assets and assure that they are used solely for authorized purposes. See 2 CFR 200.303 Internal Controls.
5. Producing a budget-to-actual report. Comparison of expenditures with budget amounts for each Federal award.
6. Processing payments on a reimbursement basis. Written procedures to implement the requirements of 2 CFR 200.305 Payment.
7. Budgeting and spending funds in allowable cost categories (i.e., direct, indirect, program, and admin costs). Written procedures for determining the allowability of costs in accordance with Subpart E - Cost Principles and the terms and conditions of the Federal award.

Links to Relevant Fiscal and Program Policies and Regulations

- [2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards](#)
- [Pennsylvania's workforce system policies](#) – PA Department of Labor and Industry
 - See Administration > Financial Management > WORKFORCE SYSTEM POLICY (WSP) No. 03-2015
- [Pennsylvania Solicitation of Funds for Charitable Purposes Act](#)
- [Workforce Innovation and Opportunity Act](#)
- [Advisories from the USDOL's Employment and Training Administration \(ETA\)](#)

Appendix C – Budget Narrative Instructions

The budget narrative must provide a description of costs associated with each line item on the budget template. It should also include a description of leveraged resources provided (as applicable) to support grant activities.

Use the following guidance for preparing the budget narrative:

Personnel (1): List all staff positions by title (both current and proposed). Give the annual salary of each position, the percentage of each position time devoted to the project, the amount of each position's salary funded by the grant, and the total personnel cost for the period of performance.

Fringe Benefits (2): Provide a breakdown of the amounts and percentages that comprise fringe benefit costs such as health insurance, FICA, retirement, etc.

Other Program Costs (3): Detail out other program expenditures, such as materials and supplies, technology, travel, etc. and break them down between 3 categories: program; work experience; training.

Direct Admin Costs (4): Provide type of direct administrative cost being charged directly to grant along with amount.

Indirect Costs (5): If you include indirect costs in the budget, then include one of the following:

a) If you have a Negotiated Indirect Cost Rate Agreement (NICRA), provide an explanation of how the indirect costs are calculated. This explanation should include which portion of each line item, along with the associated costs, are included in your cost allocation base. Also, provide a current version of the NICRA.

or

b) If you intend to claim indirect costs using the 15 percent de minimis rate, please confirm that your organization meets the requirements as described in 2 CFR 200.414(f). Clearly state that your organization has never received a Negotiated Indirect Cost Rate Agreement (NICRA), and your organization is not one described in Appendix VII of 2 CFR 200, paragraph (D)(1)(b).

Applicants choosing to claim indirect costs using the de minimis rate must use Modified Total Direct Costs (see 2 CFR 200.68 below for definition) as their cost allocation base. Provide an explanation of which portion of each line item, along with the associated costs, are included in your cost allocation base. Note that there are various items not included in the calculation of Modified Total Direct Costs. See below the definitions to assist you in your calculation.

2 CFR 200.68 Modified Total Direct Cost (MTDC) means all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and up to the first \$25,000 of each subaward (regardless of the period of performance of the subawards under the award). MTDC excludes equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000. Other items may only be excluded when necessary to avoid a serious inequity in the distribution of indirect costs, and with the approval of the cognizant agency for indirect costs.

The definition of MTDC in 2 CFR 200.68 no longer allows for any sub-contracts to be included in the calculation. You will also note that participant support costs are not included in modified total direct cost. Participant support costs are defined below.

2 CFR 200.75 Participant Support Cost (6) means direct costs for items such as stipends or subsistence allowances, travel allowances, and registration fees paid to or on behalf of participants or trainees (but not employees) in connection with conferences, or training projects.

See Section IV.B.4. and Section IV.E.1 for more information. Additionally, the following link contains information regarding the negotiation of Indirect Cost Rates at DOL: <https://www.dol.gov/oasam/boc/dcd/index.htm>.

On the spreadsheet, please follow the below steps for indirect:

- Enter Cost Rate into Cell E3 (This will calculate the amount of allowable indirect in cell E4)
- In cell E5, enter the amount of indirect being charged to this budget.
- In cells E6 and F6, you will enter a percentage to split the indirect between admin and program
- Once you have completed the above steps, cells F5 and G6 should read "OK", if it reads "ERROR" something was incorrect
- Detail out the type of indirect expenses (column A) with total cost (column B)

Other (7): Provide clear and specific detail, including costs, for each item so that we are able to determine whether the costs are necessary, reasonable and allocable. List any item, such as stipends or incentives, not covered elsewhere here.

Appendix D – Program Partner Roles

BankWork\$® Partner Roles and Responsibilities	
BankWork\$® National	<ul style="list-style-type: none"> ☒ Support the Pittsburgh program launch, including facilitating Train the Trainer sessions ☒ Provide the curriculum content and all supporting tools and documents ☒ Track monthly metrics and annual detailed metrics at the national level ☒ Provide regular operational support and share best practices from other markets ☒ Support fundraising efforts
Partner4Work	<ul style="list-style-type: none"> ☒ Facilitate regional Financial Services employer engagement ☒ Serve as liaison to financial institutions participating in BankWork\$® ☒ Oversee fund development strategies and initiatives ☒ Oversee local marketing and recruitment efforts ☒ Procure and monitor sub-contracted program provider(s) ☒ Advise on sourcing of key BankWork\$® staff (e.g., Instructor, Career Navigator) ☒ Evaluate program and report outcomes to with BankWork\$® national team ☒ Identify sites and partners for program expansion
PA Bankers Association	<ul style="list-style-type: none"> ☒ Liaison with national BankWork\$® and Partner4Work to expand in Pittsburgh ☒ Recruit/encourage PA Bankers' members to participate in Pittsburgh BankWork\$® expansion ☒ Promote the BankWork\$® program across Pennsylvania ☒ Serve as a resource to Partner4Work's Financial Services employer engagement
Contracted Program Provider	<ul style="list-style-type: none"> ☒ Provide physical space, staffing, and operational capacity for BankWork\$® program ☒ Recruit, screen and enroll students ☒ Source key BankWork\$® staff (e.g., Instructor, Career Navigator), working in close collaboration with Partner4Work ☒ Provide instruction, coaching, support services, job placement support and other BankWork\$® program components ☒ Deliver key participant outcomes for BankWork\$® participants ☒ Host graduation and job fair event ☒ Track and report program data to Partner4Work ☒ Support P4W with Industry convening and fund development

Appendix E – BankWork\$ Position Descriptions

Below are descriptions for two positions required by the BankWork\$® program - Instructor and Career Navigator. See the Statement of Work for more information. Applicants must submit proposals that include these two positions; however, applicants are not limited in proposing only these positions. Applicants should submit proposals with staffing models they deem appropriate for meeting the requirements of this RFP.

Subject to review and approval by Partner4Work, the below position descriptions may be adjusted or customized to meet the needs and standards of the hiring organization.

BankWork\$® Instructor Job Description

Note: This position description is subject to change.

The BankWork\$® Instructor's primary responsibility is to provide program participants with the knowledge, skill set, and mindset required to begin a career in banking/financial services. Utilizing the BankWork\$® curriculum content and related program materials, teach the program participants the operational fundamentals of branch banking, the features and benefits of bank products and services, strong customer service and client engagement skills, and bank product/service sales and internal referral skills. Provide group and one on one coaching and mentoring to ensure each program participant has the competence and confidence to present themselves as a qualified and committed candidate for entry level teller, customer service representative, and/or personal banker positions. Work closely with bank partners to ensure that we are aware of any changes in branch functional roles/positions, desired innate and learned abilities to make sure our graduates are meeting the evolving needs of our bank partners.

- € Develop strong relationships with banks, other financial services organizations, job placement agencies, organizations serving veterans/transitioning military and spouses, community organizations and faith-based organizations, social media, and all other avenues that can serve as a source for BankWork\$® program participants.
- € Interview program candidates and administer assessments to determine eligibility for the program. Identify specific areas for individual coaching and mentoring during the program.
- € Develop and sustain strong relationships with retail recruiters and line managers at partner banks to ensure pro-active participation in our job fairs, and prioritize BankWork\$® as a source of candidates for job openings within the banks.
- € Provide program participants with individual and group training on all job search related skills; resume, cover letter, online and hard copy employment applications, keys to an effective interview, appropriate attire, timeliness, and follow up.
- € Plan and execute a formal graduation and job fair for each session.
- € Present graduates to bank partners to optimize placement results.
- € Accurately collect, record, analyze, and report/submit all required program and program participant performance data to the national CareerWork\$ team and other program stakeholders.
- € Provide feedback to CareerWork\$ regarding suggestions on updating and enhancing the program curriculum and all program materials.
- € Manage the collection and maintenance of personal/background documentation, contracts, and progress reports of program participants.
- € Provide supervision to other program personnel as appropriate.

Education and Experience

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

Knowledge, Skills and Abilities

- € Demonstrated ability to effectively interact with multicultural and diverse individuals with barriers to employment; strengths-based mindset and cultural competence is a must.
- € Excellent oral and written communication skills with the ability to implement a highly interactive and engaging classroom experience; awareness of best practices for teaching adult learners.
- € Experience in recruiting, assessing, enrolling, career coaching and placing participants/clients.
- € Strong customer service orientation and results orientation. Demonstrated sales skills.
- € Proficient in use of Windows, Word, Excel and Outlook.
- € Familiarity with online training platforms and models.
- € Team player with ability to collaborate effectively with partners and stakeholders.
- € Skilled at problem solving and project management.
- € Ability to execute events; strong logistical and organizational skills.
- € Professionalism and strong work ethic.
- € Must have reliable access to transportation and ability to travel locally and regionally.
- € Additionally, must be available to attend Train-the-Trainer sessions offered by CareerWork\$.

BankWork\$® Career Navigator Job Description

Note: This position description is subject to change.

The BankWork\$® Career Navigator's primary responsibility is to provide employment preparation, job placement support and retention support to BankWork\$® program participants. This position will also provide business outreach to all local banks to develop job opportunities for graduates by cultivating and maintaining relationships with bank recruiters and managers. As a member of the BankWork\$® team, the Career Navigator will participate in the marketing of the program and assist in the recruitment and selection of candidates.

Placement and Retention

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

Post-employment support

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

Marketing Outreach

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

Additional Program Support

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

Education and Experience

- € 3+ years experience in employment services, human resources, social services or other related field.
- € Background in retail branch banking is preferred.
- € Experience working with multicultural and/or disadvantaged populations.

Knowledge, Skills and Abilities

- ∄ Demonstrated ability to effectively interact with multicultural and diverse individuals with barriers to employment; strengths-based mindset and cultural competence is a must.
- ∄ Excellent oral and written communication skills.
- ∄ Strong interpersonal skills and ability to demonstrate corporate professionalism.
- ∄ Experience in recruiting, assessing, enrolling, career coaching and placing participants/clients.
- ∄ Strong customer service orientation and results orientation. Demonstrated sales skills.
- ∄ Proficient in use of Windows, Word, Excel and Outlook.
- ∄ Team player with ability to collaborate effectively with partners and stakeholders.
- ∄ Skilled at problem solving and project management.
- ∄ Ability to execute events; strong logistical and organizational skills.
- ∄ Professionalism and strong work ethic.
- ∄ Must have reliable access to transportation and ability to travel locally and regionally.

Appendix F – BankWork\$ Curriculum Overview



Curriculum Overview

Delivered through an immersive hybrid model combining instructor-led training, real-world simulations, and direct employer engagement.

