Request for Proposals

Comprehensive Career Center Operator

FY 2025 – FY 2028

Proposals due by 5:00 p.m.
Friday October 6, 2023

Issued: May 8, 2023
Bidders Conference: June 15, 2023,
Questions: CareerCenterRFP@Masshireboston.org
Contact: Angela McCabe 617-872-7464
Angela.McCabe@masshireboston.org
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Section I: General Information

The Boston Private Industry Council (PIC), which serves as the MassHire Boston Workforce Development Board (hereinafter referred to as “the Board”), in coordination with the Mayor’s Office of Workforce Development (OWD), is issuing this Request for Proposals (RFP) for the purpose of selecting one or more organizations to operate a Comprehensive Career Center with the appropriate capacity and expertise to provide innovative, integrated, and compliant workforce development services for the benefit of job seekers and businesses (collectively referred to throughout as “customers”). These services include Workforce Innovation and Opportunity Act (WIOA) required services and related partner services.

Applicants are expected to articulate how they will make customer-friendly employment services available to both job seekers and employers, and how they will provide higher intensity career services for WIOA-eligible customers. Proposals will be evaluated on their commitment to enrolling WIOA-eligible customers and to providing career services to these customers, particularly those who do not receive training vouchers (Individual Training Accounts or ITAs). Applicants must also describe how they will integrate these services with those provided by federally funded state agencies such as the Department of Transitional Assistance, the Massachusetts Rehabilitation Commission, and the Department of Elementary and Secondary Education.

The Operator must operate one or more comprehensive career centers (also referred to as “American Job Centers”). In addition, the Operator may elect to add Affiliate sites (also known as satellites) or Access Points to extend their reach to underserved geographic or demographic tracts. An Affiliate Site requires that one or more mandated partners are physically located at the site in addition to the employment service representative (Wagner-Peyser staff). The Operator is strongly encouraged to enter into an agreement with a partner organization to staff an Affiliate Site. An Access Point is a referral site that will market career center services and enroll individuals in the career center system before referring them to the comprehensive career center for career navigation services.

The Board reserves the right to select either one or two operators to serve the geographic and demographic needs of Boston residents. Applying to serve as the Boston region’s sole operator will not negatively impact a proposal if the Board decides to charter two operators.

(Note: The Department of Labor is currently reviewing the rules on “merit staffing” (in our case, state government staff) under the Wagner-Peyser Act. Of the sixteen local workforce areas in Massachusetts, Boston and three other regions currently operate under a waiver that allows them to use Wagner-Peyser funding to hire staff rather than use state merit staff. If this rule is amended, there will be a transition of at least 18 months, during which the Operator(s) will continue to function under the current waiver, while working with the Department of Career Services to jointly hire and supervise state staff for the labor exchange services funded by Wagner-Peyser for the remainder of the charter period.)
A. Purpose of RFP and Contract Period

The purpose of this RFP is to solicit proposals from qualified entities to serve as a WIOA Career Operator for the local workforce development area (LWDA). The proposal will be considered with respect to cost, scope, content, and innovation. A successful proposal will be required to serve all persons requesting assistance, including low-income individuals, dislocated workers, veterans, and individuals requiring academic and occupational education and training to become gainfully employed. The organization(s) with the proposal that, in the opinion of the Board, provide the best plans for operating a Comprehensive Career Center(s) will enter contract negotiations. The Board reserves the right to select either one or two Operators, based on available funding and the quality of the proposals. The period of performance will be **July 1, 2024, through June 30, 2028**.

B. RFP Schedule

<table>
<thead>
<tr>
<th>Event</th>
<th>Date/Time</th>
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<tbody>
<tr>
<td>RFP Released</td>
<td>May 8, 2023</td>
</tr>
<tr>
<td>Letter of Intent due</td>
<td>July 28, 2023</td>
</tr>
<tr>
<td>Bidder’s Conference</td>
<td>June 15, 2023, at 2:00</td>
</tr>
<tr>
<td>Applicants’ questions submitted in writing</td>
<td>Ongoing through September 8, 2023</td>
</tr>
<tr>
<td>Proposals due</td>
<td>October 6, 2023</td>
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<tr>
<td>Board votes to approve charters</td>
<td>December, 2023</td>
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<tr>
<td>Appeal process</td>
<td>January 1, 2024, to March 31, 2023</td>
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<tr>
<td>Transition Period</td>
<td>April 1, 2024, to June 30, 2024</td>
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<tr>
<td>Contract Start</td>
<td>July 1, 2024</td>
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C. Eligible Bidders

Eligible entities include:

"An entity (public, private, or nonprofit), or consortium of entities (including a consortium of entities that, at a minimum, includes 3 or more of the Career Partners (as defined in WIOA Section 3) described in [WIOA Section 121(b)(1)], of demonstrated effectiveness, located in the local area, which may include:

1. an institution of higher education
2. an employment service State agency established under the Wagner-Peyser Act
3. a community-based organization, nonprofit organization, or intermediary
4. a private, for-profit entity
5. a government agency
6. another interested organization or entity, which may include a local chamber of commerce or other business organization, or a labor organization."
EXCEPTION: Elementary schools and secondary schools shall not be eligible for designation or certification as Career Operators, except that nontraditional public secondary schools and area career and technical education schools may be eligible for such designation or certification.

The agreement between the Boston PIC and the Career Operator shall specify the Operator’s role. That role may include coordinating service providers within the Career Center, as well as being the primary provider for services within the LWDA.

Any bidder with whom the Boston PIC executes a contract for the provision of the services described in this RFP shall be a sub-recipient pursuant to applicable federal laws and regulations and shall be required to comply with 2 CFR Part 200, as well as WIOA and all other applicable federal and state laws and regulations.

D. Integrity Firewalls

The concept of integrity firewalls is to ensure that customers perceive and receive counsel and information that is not biased toward any specific organization(s). This issue can arise in perception whenever an organization that operates education, training, and/or fee-based placement services, also operates a Career Center; regardless, of whether that organization is the lead or a member organization of a collaborative bid.

Providing a customer-centered array of the best services and choices for each customer is a guiding principle of Career Centers. They may refer individuals to organizations participating in the operation of Career Centers, however, these referrals must be objective and impartial at all times. The Operator must provide equal access to information, including marketing materials, on other vendors and programs.

E. Funding Availability

To assist with budget development in response to this RFP, core funding amounts (Wagner-Peyser, State line item, and WIOA (service dollars not including training funds) for the Career Centers over the last 3 years are indicated below. In addition, Boston receives approximately $400,000 to operate the “Re-Employment Services Eligibility Assessment” (RESEA) and other smaller amounts to support infrastructure. The Boston PIC does not guarantee this figure as an accurate projection of annual funding available during the term of any contract or of any future funding. You should assume level funding to draft the budget.
All amounts are estimates for planning purposes and subject to change.

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<thead>
<tr>
<th></th>
<th>FY 2021</th>
<th>FY 2022</th>
<th>FY 2023</th>
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<td>$1,049,608</td>
<td>$1,630,939</td>
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<tr>
<td>Wagner-Peyser</td>
<td>$1,034,610</td>
<td>$1,192,005</td>
<td>$1,165,735</td>
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<td><strong>System Total</strong></td>
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<td><strong>$4,201,713</strong></td>
<td><strong>$5,445,093</strong></td>
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*WIOA includes funding for Individual Training Accounts (ITA)

F. Right to Cancel

The Boston PIC reserves the right to delay, amend, reissue, or cancel, all or any part of this RFP at any time without prior notice. The Boston PIC also reserves the right to modify the RFP process and timeline as deemed necessary in its sole discretion. Subject to any guidance being issued by the U.S. Department of Labor and/or the Massachusetts Division of Career Services, this RFP and/or any subsequent sub-awards will be modified to ensure compliance.
Section II: Vision and Priorities

The Boston career center Operator procurement for 2024-2028 is designed to identify and select a provider who will offer a career navigation strategy that reflects employer needs while prioritizing job seekers most in need of support for economic advancement, and centers equity and job quality in all services.

Our vision is a Boston career center system that provides career navigation services that enable individuals to secure career-oriented employment with an opportunity to advance through further education and training, while meeting the short-term and long-term needs of area employers. To accomplish this, the Board is looking to align the labor exchange resources, including coaching, training, and education, more efficiently and effectively, particularly in light of the labor market changes brought about by the pandemic.

In recent years, career center volume has declined considerably. Our vision of career centers in 2024 is not restricted to a large resource room and other in-person services. We expect successful applicants to offer both in-person and remote services to be responsive to the diverse needs and preferences of customers, with an emphasis on one-on-one time with WIOA participants who have significant barriers to employment.

Preference will be given to comprehensive career center proposals that also focus on one or more subsets of customers who need more targeted and intensive services, either internally or through Affiliate Sites or Access Points. Examples of this include reentry services in the Metro North area and young adult services in Lowell and Lawrence.

The Board has established five priorities to meet the needs of job seekers and employers:

1. The ability to reach and serve City of Boston residents, especially those with the most significant barriers to employment, including but not limited to low-income, public assistance recipients, homeless, individuals in need of basic skills, returning citizens, job seekers with disabilities, older workers, and Veterans.
2. The use of partnerships and collaborations to ensure there are no gaps in the continuum of quality training, workforce development and supportive services. The goal is to address a wide range of barriers for jobseekers, which will require a high degree of coordination among partners and accessibility to wrap-around support services.
3. The integration of work readiness programs for those with the lowest levels of literacy and skills that will lead to sustainable employment.
4. Strong connections to employers that result in quality job opportunities for career center customers. Quality jobs are those that provide a livable wage, comprehensive benefits, and Strong and, access to, and support for, advancement.
5. The use of career pathways models that provide clear sequences and connection education and training programs and jobs with defined career ladders, which allow participants to progress from one level to the next to improve their career prospects.
To meet the needs of the key sectors, the PIC is striving to develop pipeline strategies to diversify the workforce in healthcare, information technology and construction, as outlined in the Greater Boston Regional Plan. The Board uses labor market information to customize strategies to the needs of each sector, to guide training investments, and to inform career navigation and supportive services to ensure successful transitions.

Career Centers will play a critical role as brokers and connectors to implement this vision of an integrated workforce development system. They will capture labor market intelligence, based on the experiences of job seekers, which can be used to share with others in the business of preparing individuals for employment. Through collaboration with WIOA Partners - city, state, and federal agencies as well as nonprofit partners - Career Centers will be able to draw talent from a range of preparation pathways to present to employers. The WIOA local memorandum of understanding (Attachment 1) has formalized this network to integrate State agency partners within the Career Center.

A successful bidder will serve all persons requesting assistance, with a focus on WIOA-eligible individuals, through collaboration with agencies and organizations that share a mission to serve those with specific barriers to employment:

- Dislocated workers and low-income adults
- Public assistance recipients (Department of Transitional Assistance (DTA), Housing and Urban Development, Supplemental Security Income)
- Individuals in need of basic skills (Adult Basic Education (ABE), English Language Learners (ELL), Community College)
- Older Workers
- Individuals with Disabilities
- Returning Citizens
- Young adults (aged 18-24)
- Veterans

We are seeking applicants who share this vision of providing high-quality career services in Boston. We address our priorities through commitments to (1) excellent customer service, (2) innovative and effective service design, (3) high-quality staffing, and (4) strong partnerships to enhance services to those typically underserved.
A. Service Model

To foster this vision of an integrated system, WIOA has established three levels of certification for its Career Centers: Comprehensive, Comprehensive with Affiliate site(s), and the use of Access Point.

Applicants are currently asked to apply to operate one or more Comprehensive Career Centers, with a strong preference for including Affiliate/Specialty sites with a focus on customers traditionally underserved.

1. Comprehensive Career Center (designated as an “American Job Center” consistent with WIOA regulations) — requires that all available mandated partners be physically co-located and/or, providing their core services on a part-time or full-time basis, at the Career Center in-person or electronically. A comprehensive site must have a resource area that is fully equipped with computers, printers, scanners, phones, etc. that is accessible to all job seekers. A completed Memorandum of Understanding (MOU) will be signed and include all partners at the American Job Center. The Boston PIC staff will negotiate and approve the mandated unified partner MOU.

2. Affiliate/Specialty site— A Comprehensive Career Center may elect to also operate one or more Career Center Affiliate site(s). This requires that one or more mandated partners are physically located at the Affiliate site in addition to the employment service representative (Wagner-Peyser staff), and that core services are offered on a full-time basis. Staff at an Affiliate site must regularly attend cross-training on all partner services, must have information or electronic access to all of the system’s services, and have computers available for use by job seekers. MOUs will describe the specific arrangements with various partners for Affiliate sites.

3. Career Center Access Point — An Access Point must offer at least one staff person who is knowledgeable of the WIOA partner services and able to successfully refer clients to those services coupled with an electronic network providing integrated core services. The Access Point should be located at a community partner site to allow the career center to expand its footprint in the community, serve an underserved population, or reach a geographic area of need. The Access Point will coordinate and collaborate with the Comprehensive Career Center.
Section III: Solicitation Process and Terms

A. Period of Solicitation

The deadline to submit a response to the RFP is 5:00 p.m., Friday October 6, 2023.

B. Letter of Intent

Interested applicants are asked to submit a letter of intent no later than July 28, 2023. The letter should be on your organization’s letterhead and include the name and email of a contact person. The letter should include a statement of intent to apply and be signed by an authorized signatory. The LOI is non-binding and does not commit any applicant to submit a proposal, nor does the lack of LOI exclude an applicant from submitting a response to the RFP.

C. Bidder’s Conference

A pre-bid conference will be held via Zoom on June 15, 2023, beginning at 11:00 a.m. Please email Angela.McCabe@masshireboston.org to register. Questions posed at the bidder’s conference will be answered to the extent possible and allowable at that time. Any questions not answered may be submitted via email to CareerCenterRFP@Masshireboston.org.

D. RFP Inquiries, Questions, Answers, and Ex Parte Communications

The primary mode of communication between the PIC and potential applicants will occur through the website.

PIC website at http://www.bostonpic.org/career-center-rfp-2024
MassHire site at http://www.masshireboston.org/career-center-rfp-2024

Applicants are encouraged to submit questions by email to CareerCenterRFP@Masshireboston.org. Responses to applicants’ questions will be available on the PIC website and updated through September 8, 2023. It is the applicant’s responsibility to check the page frequently for updated answers that might help guide submission. Questions will not be answered over the phone or in person. Questions received after 5:00 p.m. ET on September 8, 2023, will not be answered.

E. Proposal Review and Evaluation Process

There is a fundamental priority to serve Boston residents that should be addressed throughout the proposal. Emphasis should be on conformance to the RFP instructions, responsiveness to requirements, completeness, and clarity of content. Elaborate and lengthy proposals are neither necessary nor desired.

Phase I: Proposals will be reviewed and ranked by a review team of PIC and OWD staff, members of the Workforce Development Committee (WDC) and the members of the WIOA partnership.
Proposals will be ranked based on the evaluation criteria outlined in Section III (E) below. These rankings will be used as a guide for discussion and determination of recommendations.

**Phase II:** The recommendations of the review team will be presented to the Workforce Development Committee and to the MassHire Workforce Board for approval. All contract awards will be considered provisional pending receipt of any additional documentation regarding administrative qualifications, any other area of concern, the successful completion of contract negotiations, and the availability of funds.

**F. Criteria**

Each section is weighted by the point scale. The PIC retains the right to reject any proposal that does not meet the essential criteria. The PIC also retains the right to fund a lower ranked proposal over a higher ranked proposal because of valid policy considerations, including but not limited to, organizational experience, past performance, geographic considerations, leveraging of outside resources, and target populations. The review team will evaluate each submitted proposal based on the following:

<table>
<thead>
<tr>
<th>Item</th>
<th>Maximum # of Points</th>
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<tbody>
<tr>
<td>Proposal Cover Page</td>
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<tr>
<td>Table of Contents</td>
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<tr>
<td>Executive Summary</td>
<td>5</td>
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<tr>
<td><strong>Proposal Narrative Section</strong></td>
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<tr>
<td>Organizational Structure and Capacity</td>
<td>10</td>
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<tr>
<td>Staffing Plan</td>
<td>15</td>
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<td>Location and Accessibility</td>
<td>15</td>
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<tr>
<td>Program Description:</td>
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<tr>
<td>Job Seeker Services</td>
<td>30</td>
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<td>Employer Services</td>
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<td>Use of Affiliate sites</td>
<td>15</td>
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<td>Priority of Service</td>
<td>25</td>
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<td>Relationship with Partners</td>
<td>20</td>
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<tr>
<td>Technology, Data Management, and Innovation</td>
<td>25</td>
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<tr>
<td>Budget Narrative</td>
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<td><strong>Required Forms</strong></td>
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<td>Budget</td>
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<tr>
<td>Statement of Compliance Form</td>
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<tr>
<td>Customer flow chart (optional)</td>
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<td>Organizational Chart</td>
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<tr>
<td>Statement of Assurances</td>
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<td><strong>Total</strong></td>
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Section IV: RFP Response Instructions – Comprehensive Center

General Preparation Instructions

All proposals must be received by 5:00 p.m. ET on October 6, 2023. Proposals received late will not be accepted. Proposals that fail to follow the requirements set forth in this RFP regarding minimum requirements and format may be considered non-responsive. The PIC reserves the right to reject any proposals in its sole discretion. Proposals should be sent by email to: Angola.McCabe@masshireboston.org.

The proposal submission must:

1. Include all required forms, narrative answers, and attachments.
2. Be submitted in a format that is suitable for ease of review with minimal repetitious material and no more than 25 narrative pages. The executive summary (2-page limit), budget narrative, budget forms, and required attachments are excluded from the 25-page limit.
3. Align responses with the number and letter of each set of information requested in Section E (Program Narrative) above. Responses must use the forms provided in Section VI: Required Forms and additional materials will not be reviewed.
4. Use 12-point font, one-inch margins, and singlespacing.
5. Not include letters of recommendation.
6. Be submitted in accordance with the terms, conditions, and procedures stated in this RFP.
7. Include forms and assurances signed by an authorized signatory (typically a director, president or CEO of an organization or any individual who has authority to negotiate, enter and sign contracts on behalf of the organization).

Withdrawals

A submitted application may be withdrawn prior to the application due date. A written request to withdraw the application must be submitted to the Boston PIC at the address listed above. If an applicant does not withdraw a proposal by the due date, the proposal becomes the property of the Boston PIC and subject to public disclosure.
A. Executive Summary

The Executive Summary (2 pages maximum) must be submitted on the organization’s letterhead and must provide:

1. A brief overview of the organization’s qualifications, including the number of years it has successfully provided services with the types of job seekers and communities served.
2. A concise description of the proposed services, including a plan to integrate partner services.
3. A vision for employment services/career center services in the current environment.
4. If submitting as a formal partnership or collaboration, identify all key partners and the lead entity. (5 points)

B. Program Narrative

Please respond to the following in detail using specific examples or evidence when possible and respond for all proposed job seekers as applicable. If you are currently operating a Career Center, please reference Career Center (MOSES) activities and data rather than your agency data when responding. Please be as specific as possible and provide examples where applicable.

1. Organizational Structure and Capacity (10 points)
   a. Provide a concise description of your organization, including the legal status of the organization, the governance structure, and the mission.
   b. Briefly describe how your overall management structure will support program operations and goal attainment for the Career Center.
   c. Explain your experience providing programs and services that are grounded in cultural competency, equity and responsive to the needs of the communities you serve.
   d. Describe what data, research, and information you will use to understand the evolving landscape of service needs and customers.
   e. Describe how you monitor your performance and continue to adjust and innovate through continuous quality improvement.
   f. If submitting as a partnership or collaborative, please identify all the partners or subcontractors (if applicable) and briefly explain partner services, roles provided, expertise and rationale for participation in the program model. Attach detailed MOUs for all partners.

2. Staffing Plans (15 Points)
   a. Describe your proposed staffing plan for the Career Center. The proposal will include a position for a full-time director who will oversee implementation of all services at the Career Center. Career centers should have at least one qualified career coach (list qualification or certification).
   b. Describe how WIOA services will be staffed and how customers will flow through enrollment services, assistance with employment, and follow-up.
c. Explain your proposed process for onboarding and training new staff on the regulations of WIOA and program requirements. Outline proposed language capacity at your center.

d. What are the specific strategies you will use to increase staff retention? Describe how you will address and lower staff turnover.

e. Describe your process or expected process for ensuring that career coaches are aware and up to date with trends and needs of high demand sectors.

f. Provide an organizational chart for the operating entity showing the size and structure of the organization and how the Career Center would be integrated into the rest of the organization.

3. **Location and accessibility** (15 points)

a. Describe the physical facilities to be used to house all aspects of the comprehensive Center, including the address and total square footage of the site. Additional credit will be given to co-located or satellite services.

b. Describe how the career center will serve customers outside of the traditional business hours through staffing plans, partnerships, co-location, or uses of technology, etc.

c. Describe how you incorporate information about access, inclusion, priority of service, disclosure, accommodation, and other relevant matters into your marketing materials.

4. **Program Description**

a. **Job-Seeker Services** (30 points)

Career centers are expected to provide job seeker services that are asset-based and culturally supportive, with access to multilingual staff and materials, assessments that identify strengths and transferrable skills, and individual career coaching.

i. Describe how you will market to and recruit adults and dislocated workers, including those from targeted, hard-to-serve populations which may require specialized marketing and outreach efforts.

ii. Describe how job seekers are assessed upon enrollment. What tools, tests, or methods are used to determine levels of basic skills, digital literacy, work readiness, interests and aptitudes, occupational skills, and supportive service needs.

iii. Describe the process for developing individual employment plan (IEP), including how and when the IEP is reviewed and updated.

iv. Explain how individualized services (IS) are provided to job seekers. Identify the frequency and availability of case management and other IS.

v. Describe any innovative features in your IS offerings.

vi. When determining eligibility for training, how do you address financial aid, childcare services and those other resources that help increase access to and retention in education, training, and employment?
vii. WIOA requires follow-up activities be provided, as appropriate, to individuals who have exited from the program for up to one year. Describe your follow-up strategies for individuals in terms of (1) retention and advancement services for employed individuals, and (2) reemployment services for job seekers who lose their jobs.

viii. You may provide a detailed flowchart showing how a job seeker will access the services (virtual and in-person) available through the Career Center. This does not count against your narrative page total.

b. Employer Services  (30 points)

Career centers should strive to work with employers who pay a livable and fair wage, provide family-friendly benefits, offer flexibility, invest in employee growth and development, and cultivate inclusion.

i. your current and/or proposed business services structure. Explain how you will identify quality employers and incorporate a demand-driven approach to service delivery.

ii. Describe service strategies that are most effective in placing job seekers and how you will maximize the use of those strategies going forward.

iii. Describe how you will provide a diverse pipeline of talent for employers.

iv. Explain how you are engaged in regional employer business strategy. Describe your goals and outcomes, and the challenges and opportunities you foresee in having a more regional, collaborative approach to serving businesses.

v. Describe your experience with employer tax credits and bonding, and assisting with on-the-job training, Registered Apprenticeships, and customized training opportunities.

5. Specialty/Affiliate Centers and Access Points  (15 points)

Despite the volume of customers served, there are specific neighborhoods and populations that have not traditionally been served by Boston Centers (Young adults, homeless, reentry etc.). The Career Center is strongly encouraged to expand their reach by selecting a priority population to serve.

a. Identify a specific population you are targeting based on your expertise or location. What need have you identified that can be met by targeting this group with intensive career center services? Provide data to support your choice.

b. Describe the outreach and service plan for this population. How will you use partnerships to support the plan?

c. Describe the structure you will use to serve this population – Partnership, co-location, access point, or affiliate center.
6. **Priority of Service**  (25 points)

WIOA created a priority of service (POS) requirement for low-income adults, public assistance recipients, individuals with disabilities, and individuals who are basic skills deficient, to receive services consistent with priority of service for veterans.

a. Explain how you plan to target these priority populations.

b. How are priority customers identified at enrollment, notified of priority services, and served in accordance with POS policy?

7. **Relationship with partners**  (20 points)

a. Describe your level of involvement with the other parts of Boston’s workforce development system including ABE, higher education, job training, etc. beyond attending partner meetings.

b. Describe how you will increase community outreach to ensure that businesses, job seekers, and the public are aware of workforce services available.

c. Describe how you will work with community organizations, especially existing social services agencies, to provide wraparound services for customers with barriers.

d. Discuss how you would expand access to services throughout the region through partnerships, along with any experience in developing such partnerships.

e. Describe how you will work with required partners co-located at the career center.

8. **Technology and Innovation**  (25 points)

As a result of the pandemic and increased technology, virtual programming has become more common for individuals seeking basic career services and WIOA services.

a. Describe how you will incorporate access to virtual services as a part of the overall service delivery model. *Note: This should include how virtual options for orientation, eligibility determination, workshops, case management, and more will be offered.*

b. Describe the level of services do you intend to offer virtually/in-person.

c. Outline any other innovations, beyond virtual services, you plan to implement over the next 1-3 years.

d. Describe how you will collect and evaluate customer needs and satisfaction for continual service improvement.

e. Provide assurances that you will have the capacity to track and report data on virtual services in accordance with all applicable requirements using MOSES.

9. **Budget and budget narrative**  (10 Points)

*(The information requested in this section does not count towards the limit of 25 pages to your submission.)*

To efficiently use funds from Wagner-Peyser, WIOA Title 1 Adult & Dislocated Worker, and
the state line item to deliver Career Center services to customers, it is increasingly important to leverage a wide range of public and private resources to support Career Center operations. Applicants are required to demonstrate either in-kind or cash match resources that can be valued at 25% or more from a variety of funding sources. In-kind and cash match resources can support any budget item if it supports Career Center activities. Describe your revenue strategy for the next year. Include any grants, financial partnerships, and/or fee for service strategies.

a. Applicants are required to use the forms included in this RFP to submit 1) an overall budget (personnel, non-personnel, indirect, revenue), 2) a line-item detailed budget, and 3) an accompanying narrative that explains the line items in more detail, any description of revenue-generating activities, if planned, and/or any grant funding already secured for FY 2022. These additional sources of revenue should be included in the match category of the overall budget.

C. General Procurement Statements and Limitations

The Boston PIC is an Equal Opportunity Employer and encourages competition at all levels. Any interested and qualified entity is encouraged to submit a bid.

The Boston PIC:

1. Reserves the right to select either one or two operators to serve the geographic and demographic needs of Boston residents. Applying to serve as the Boston region’s sole operator will not count against a proposal if the Board decides to charter two operators.

2. Shall not be liable for any cost associated with responding to this RFP and will not authorize such costs as part of any contract with the selected organization.

3. Regards all proposals in response to this RFP as property of the Boston PIC. The proposals will not be available for public viewing until after contracts with one or more service providers are finalized. All information not labeled PROPRIETARY/CONFIDENTIAL by a bidder and contained in bid responses will become open for public review once a contract is signed or all bids are rejected.

4. In coordination with OWD, is not committed to fund any proposals submitted before execution of a contract.

5. Reserves the right to accept or reject any or all proposals received or to negotiate terms of a proposal with a qualified bidder and/or to cancel or reissue this RFP in part, or in its entirety.

6. Reserves the right to correct any error(s) and/or make changes to this RFP as it deems
necessary at any time.

7. Reserves the right to award one or more contracts for any items/services solicited via this RFP.

8. Reserves the right to negotiate the final terms of any and all contracts or agreements with bidders selected and any such terms negotiated as a result of this RFP may be renegotiated and/or amended to successfully meet the needs of the LWDA.

9. Reserves the right to contact any individual, agency, employer, or grantee listed in the proposal; to contact others who may have experience and/or knowledge of a bidder’s relevant performance and/or qualifications; and to request additional information from any and all bidders.

10. Reserves the right to conduct an on-site review of records, systems, procedures, including credit and criminal background checks, etc. of any entity (and its employees) selected for funding. This may occur either before or after the award of a contract or agreement. Misrepresentation of a bidder’s ability to perform as stated in a proposal may result in cancellation of any contract or agreement awarded.

11. Reserves the right to withdraw from negotiations at any time before a contract is executed. Contracts to be awarded as a result of this RFP are with the sole approval of the Boston PIC’s Board of Directors, with the agreement of the Chief Elected Official.

12. Reserves the right to withdraw or reduce the amount of an award or to cancel any contract or agreement resulting from this procurement if adequate funding is not received from the U.S. Department of Labor via the Massachusetts EOLWD/Department of Career Services or other funding sources or due to legislative or regulatory changes.

Bidders shall not under penalty of law, offer or provide any gratuities, favors, or anything of monetary value to any member, director, officer, employee, or agent of the Boston PIC for the purpose of having an influencing effect toward their own proposal or any other proposal submitted hereunder.

No employee, officer, or agent of the Boston PIC or OWD shall participate in the selection, award or administration of a contract supported by WIOA funds if a conflict of interest, or potential conflict, would be involved.

Bidders shall not engage in any activity that will restrict or eliminate competition. Violation of this provision may cause a bidder’s bid to be rejected. This does not preclude partnerships or subcontracts.

All proposals submitted must be an original work product of the bidders. Copying, paraphrasing, or otherwise using substantial portions of the work product from other entities without clear attribution and submitted hereunder as original work of the bidder is not permitted. Failure to adhere to this instruction may cause the proposal to be disqualified and rejected.
The contents of a successful proposal may become a contractual obligation if selected for award of a contract. Failure of the bidder to accept this obligation may result in cancellation of the award. No plea of error or mistake shall be available to a successful bidder as a basis for release of proposed services at the stated price/cost. Any damages accruing to the Boston PIC as a result of a bidder’s failure to contract may be recovered by the PIC from the bidder.

A contract with the selected bidder may be withheld, at the Boston PIC’s sole discretion, if issues of contract or questions of federal or state regulatory non-compliance, or questioned/disallowed costs exist, until such issues are satisfactorily resolved. The Boston PIC may withdraw award of a contract if the resolution is not satisfactory to the PIC.

Funding availability is subject to change for subsequent program years; therefore, bidders should be aware that subsequent contract amounts, if any, are subject to change from year to year based upon fluctuations in funding. If funds awarded for a contract year are not fully expended by a contractor by the end of a contract year (June 30), unexpended funds may revert to OWD for disposition and may or may not be available for subsequent, if any, contract year expenditures.

The contractor shall assume responsibility for all services offered in its bid proposal. The contractor will be responsible for all material errors and omissions in the performance of the contract.
Section V: Roles and Responsibilities

A. Role of the Comprehensive Career Center

Comprehensive Centers serve as the primary means for Boston residents to access an array of programs and systems that would otherwise require separate entry points. Comprehensive Career Centers are the connection for job seekers, occupational skills training providers, and higher education, and employers.

With job seekers, Comprehensive Centers shall:

- Determine eligibility and track job seekers over the course of the grant enrollment period
- Assess qualifications and experience
- Develop an Individual Employment Plan (IEP) for a job seeker
- Inform and guide individuals to sources of information about the current and anticipated demand for their skills
- Assist in identifying education and training that will enhance a job seeker’s marketability
- Provide training in job acquisition skills (resume development, interviewing)
- Support job seekers through the difficulties and challenges posed by unemployment in the current era, including making appropriate referrals to partner organizations
- Connect job seekers to businesses and employment opportunities

Boston has a robust network of occupational skills training and adult education providers. The WIOA local memorandum (Attachment 1) formalized this network to integrate partners within the Comprehensive Career Center. A Career Center will work in collaboration with the required partner agencies and service providers to offer seamless services to job seekers and employers.

With community colleges, training providers, and the Adult Basic Education system, Comprehensive Career Centers:

- Act as information brokers between job seekers and educational institutions and facilitate connections between them; and
- Partner on programs that provide career pathways through vocational training, Apprenticeship programs, On-the-Job-Training, and other work-based learning programs.

With business customers, Comprehensive Career Centers:

- Provide an array of services to connect businesses with a qualified workforce through information sessions, job fairs, recruitments, screening, etc.
• Focus on relationship development with businesses to meet immediate and projected hiring and training needs.
• Assist employers in the implementation of apprenticeships, On-the-Job-Training, and skill-based initiatives; and
• Educate employers about government grants and incentive programs.

WIOA requires Comprehensive Career Centers to partner with the following programs to provide Meaningful Assistance to job seekers enrolled in partner programs. “Meaningful Assistance” is defined as assisting on-site using trained staff or providing assistance by phone or via other technology by trained staff in a reasonable time.

1. Adult Basic Education
2. Temporary Assistance for Needy Families (TANF) and Supplemental Nutrition Assistance Program (SNAP)
3. Senior Community Service Employment Program
4. Trade Adjustment Assistance Programs
5. Unemployment Compensation Programs
6. Disabled Veterans’ Outreach Program

Partnership with these six programs can be achieved through many strategies, including:

• Career Center staff are physically present at the partner program location to enroll co-enrolled job seekers into WIOA programming.
• Partner staff are physically present at the Career Centers to provide information to individuals about Career Partner programs or services; or
• Career Center staff are connected through technology (such as online portals) to Career Partner programs to provide meaningful information or services.

B. Role of Boston PIC/MassHire Boston Workforce Board

The PIC, serving as the WDB, is charged with issuing Career Center charters, establishing policies, allocating funding, providing program oversight and technical assistance, and supporting capacity building. It ensures that the Career Centers and the workforce development system in general serve the interests of both area job seekers and businesses seeking workers in an efficient, effective, and well-coordinated manner.

As the chartering authority for Boston’s Career Center system, the PIC has the responsibility to ensure high quality service delivery, achievement of performance outcomes, and productive and efficient use of
public dollars. The PIC serves the audit, quality assurance monitoring, and customer satisfaction and service review functions

C. Role of the OWD

The Mayor’s Office of Workforce Development (OWD) currently serves as the administrative entity for the Boston WDB under WIOA. OWD contracts directly with Career Operators to administer all funds, including but not limited to Wagner-Peyser, WIOA, and Massachusetts Career line-item funds. The role of OWD as fiscal agent includes:

1. Fiscally administering designated grant funds, including: serving as the liaison to state funding agencies; developing integrated budgets; accounts record keeping (including maintenance of general ledgers, cash requests, and bank reconciliations); maintaining financial software; procuring goods and services; managing vendor contracts (including invoice review and payment); preparing federal, state and local reports; administering payroll/benefits; audit support and responses; fiscal monitoring of all Operators to assure regulatory compliance; and developing any necessary fiscal procedures to comply with funding requirements.

2. Collecting and approving the annual budget, with flexibility given to Operator(s) to make ongoing adjustments, subject to PIC approval, to respond to any fluctuations in funding.

3. Monitoring, in conjunction with the state, a Career Center contract for legal and financial compliance; implementing corrective action, as necessary.

4. Aligning local monitoring with state and federal monitoring, as much as possible, to reduce unnecessary duplicative demands.

5. Coordinating information and providing fiscal analysis to provide advice as to the continued vitality of funding streams on an on-going basis.

6. Working in conjunction with the PIC to develop appropriate policy, service delivery and oversight functions.

D. Performance, Data, Reporting, and Evaluation

A Comprehensive Career Operator will be responsible for tracking services and outcomes in the state case management Massachusetts Career Employment System (MOSES), as well as the local data metrics currently under development. Staff of the Career Operator will be required to complete MOSES training within three months of the award announcement. The Career Operator will be accountable for the integrity of the data presented and responsible for ensuring that its staff are appropriately trained to use these systems.

The Boston PIC and OWD are required to establish local performance measures to evaluate program effectiveness and achieve continuous improvement in the delivery of WIOA programs. An historical
picture of baseline goals of the Boston metrics is provided as Attachment 2.

Career Centers are evaluated annually by members of the PIC Workforce Development Committee and staff from the Boston PIC and OWD. In addition, they are monitored by the Massachusetts Department of Career Services for performance and certification compliance and by the Federal Department of Labor. Career Operators are required to comply with all levels of evaluation and monitoring of the Career Centers.

Achievement of measurable performance outcomes is a critical expectation of the Career Operator, who is accountable for the 11 WIOA measures listed:

<table>
<thead>
<tr>
<th>Adult</th>
<th>Dislocated Worker</th>
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<tr>
<td>• Employment Rate (2nd quarter after exit* from program)</td>
<td>• Employment Rate (2nd quarter after exit from program)</td>
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<tr>
<td>• Employment Rate (4th quarter after exit from program)</td>
<td>• Employment Rate (4th quarter after exit from program)</td>
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<tr>
<td>• Median Earnings (2nd quarter after exit from program)</td>
<td>• Median Earnings (2nd quarter after exit from program)</td>
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<td>• Credential Rate (within 1 year after exit from program)</td>
<td>• Credential Rate (within 1 year after exit from program)</td>
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<tr>
<td>• Measurable Skills Gain (real time measure)</td>
<td>• Measurable Skills Gain (real time measure)</td>
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* A positive exit is defined as completion of a training program for ITA funded participants or entered employment after individualized career services.

E. Chartering and Financial Contracting Information

Charter Agreements

The Boston PIC intends to enter into chartering agreements with the successful respondent(s) that will authorize the operation of a Career Center(s) upon the terms and conditions set forth in the charter for a period of up to four (4) years, pursuant to and in accordance with WIOA requirements, subject to the annual renewal of the charter during the four (4) year term based upon annual performance reviews.

A charter is a written, legally binding agreement that authorizes the operation of a Career Center. The charter is also the legal authorization that will allow the Career Operator to receive funds, charge fees, enter contracts with public and private organizations, and operate specified programs under the authority of the Boston PIC. The charter is a non-financial agreement that sets forth the terms and conditions applicable to the operation of a Career Center. The charter will be supplemented by financial contracts with OWD that provide the core funding for the operation of a Career Center. At a minimum, the charter shall contain the following:
• Specified duration,
• Quality and performance standards of the Career Center,
• Delineation of services to be provided and the center’s responsibilities,
• Statement of vision and values,
• Parties to the charter,
• Location of the Career Center,
• Incentives and sanctions,
• Standard business practices,
• Requirements for a business plan, financial systems and program and financial reporting, and
• Legal assurances, including assumption and proof of liability, responsibility for universal service to customers (including ensuring access for populations now served by publicly funded programs), the accountability and audit of funds (Single Audit Act), insurance for repayment of disallowed costs and the reasons for and methods of termination and also other federal requirements including minimum wage, workers’ compensation, prevailing wage, withholding and taxes.

Charters may be revoked by the Boston PIC if the Career Center does not meet the legal, ethical, and operational performance standards set by the Boston PIC. The Boston PIC will review the Career Center’s performance regularly and charters are subject to renewal on an annual basis based upon a comprehensive performance review.

One-Year Financial Contracts between OWD and Career Operator(s)

Financial contracts will be entered into on a cost-reimbursement basis. Career Operators that execute a financial contract for the provision of the services described in this RFP shall be a sub-recipient pursuant to applicable federal laws and regulations and shall be required to comply with 2 CFR Part 200, as well as WIOA and all other applicable federal and state laws and regulations.

The Boston PIC and OWD will negotiate financial contracts with respect to cost, scope, and content in a manner that achieves the establishment of this system in the best interests of the Boston PIC and OWD. The initial financial contract period of performance will be July 1, 2024, through June 30, 2028. Any financial contracts entered as a result of this RFP may be extended for up to three (3) additional one-year periods, subject to the agreement of both parties and subject to the continued effectiveness of a charter. An annual contract will be based upon a budget developed by the Career Operator in a form and process mandated by the Boston PIC.

Any revenues above costs generated by any not-for-profit organization through use of these funds, including interest income or other program-generated income, must be reported as program income and used for continued operation of the Career Center. Respondents may not charge individuals eligible for WIOA programs a fee for any career service; however, if any bidder intends to charge fees for enhanced services to non-eligible individuals and/or businesses, the service and fee structure must be fully described in the narrative response. A list of WIOA eligible services is included in Attachment 3.
F. Incorporation of RFP into Contract

All conditions contained in this RFP and completed Appendices and any statements contained therein will be incorporated into any contract regarding this matter. Failure of the contracting organization to accept these obligations may result in the cancellation of the selection. The contractor shall assume responsibility for all services offered in its bid proposal. The contractor will be responsible for all material errors and omissions in the performance of the contract.

G. Subcontracting

OWD and the Boston PIC encourage the formation of viable partnerships that will help to enhance outreach and recruitment efforts to benefit the local workforce area and/or provide strategies to engage employers, organized labor, and/or education in the Career Center system. Proposals using specialized services to deliver such activities may include subcontractors. Respondents must clearly identify any subcontractor and the activities such subcontractor will undertake in the proposal narrative. If the bidder currently subcontracts certain functions or activities and intends to do so as part of its response to this RFP, the subcontractor must be identified, and a certification must be included from the subcontractor attesting to its agreement to the terms of the proposal and any resulting contract.
Section VI: Right to File a Grievance

A. Local Appeals Process

After the Boston PIC completes its review of all proposals properly submitted, it will notify all applicants in writing whether or not they have been selected as a proposed Career Operator. Parties who submit proposals that are not selected as proposed Career Operators may appeal the decision of the Boston PIC in accordance with the applicable provisions of this RFP. Appeals may only be based upon a claim that the Boston PIC has failed in any material respect to follow the selection process outlined in this RFP. As set forth above, the Boston PIC is not obligated to select as a proposed Career Operator a proposal that receives the highest score based upon the application of the proposal review scoring criteria. Instead, proposed Career Operators shall be selected based upon a more comprehensive review and analysis that shall consider the results of the proposal review scoring criteria, interviews, if conducted, and the overall qualifications of the bidder. Generalized allegations of impropriety or dissatisfaction with the results of the process are not grounds for appeal.

An unsuccessful bidder who wishes to appeal a decision must fully state in writing the grounds for the appeal. This appeal must be sent by the unsuccessful bidder/appellant to the Boston PIC Chair at the Boston PIC address on or before 11:59 PM on the fifth (5th) working day after the receipt of notification of the PIC’s decision. The period within which an appeal may be filed shall be based upon the evidence of receipt received by the PIC from the overnight mail service used by the PIC. For purposes of this appeal procedure, “working day” means any day other than a Saturday, Sunday or other day on which Massachusetts state government offices or City of Boston government offices are closed. The deadline for filing an appeal request with the PIC Chair shall be calculated beginning with the first working day after the date on which the PIC receives evidence of receipt of the notice by the unsuccessful bidder or the decision of the PIC Chair is received by the appellant.

Appeal request statements must be sent by overnight mail or delivered in person. For collaborative bids, the appeal request form must be signed by an authorized representative of each member of the collaboration. Upon the written request of an unsuccessful bidder, the PIC will make available copies of those public records relating to this RFP process that are subject to the Freedom of Information Act and required to be furnished in accordance therewith.

The Chair of the Boston PIC board of directors will appoint an independent fact-finding team, consisting of a minimum of three persons who are neither members of the PIC board of directors nor the staff of the PIC. The function of the team will be to make advisory findings of fact with respect to the factual issues raised by the appeal that the team determines to be relevant and to report those advisory findings to the PIC Chair. If available, at least one member of the team will be
a person who has had experience with the procurement process in the public sector and at least one member of the team will be a lawyer. Unless the City of Boston or one of its agencies was a bidder, one member of the team will be a member of the Law Department of the City of Boston.

The independent fact-finding team will determine whether it will require or accept additional written material from the appellant or an interview with the appellant and will establish a timetable for a final local decision on the appeal after reviewing the nature of the appeal request. The PIC will notify the appellant of the team’s determinations with respect to these procedural matters and timetable within ten (10) working days of the submission of an appeal.

The fact-finding team may choose to decide based solely on the information included in the file or conduct further investigation before issuing a written determination. If they are unable to contact the appellant for the purposes of obtaining additional information needed to resolve a complaint, a written request for information must be sent via overnight mail or through some other form of communication where receipt can be verified. If an appellant does not respond, the PIC will inform the appellant in writing that the matter is considered resolved based on the lack of response.

Local Hearing Process:

The local fact-finding team may also choose to resolve the appeal by convening a local hearing. Only an individual designated by the PIC Chair may preside at a local complaint hearing. If it is determined that a hearing is necessary, the appellant will be notified in writing that the matter has been scheduled for a formal hearing. The notice shall inform the parties of certain conditions of the hearing process that include:

- the date, time, and location of the hearing,
- instruction that the local fact-finding team will conduct and regulate the course of the hearing to assure full consideration of all relevant issues and that actions necessary to ensure an orderly hearing are followed, and
- instruction that the local fact-finding team must rule on the introduction of evidence* and afford the parties the opportunity to present, examine, and cross-examine witnesses.

*NOTE: For clarity it must be stated that an administrative hearing is not the same as a court of law. Technical rules of evidence do not apply. It is up to the local fact-finding team to follow principles and procedures that are designed to assure credible evidence that can be tested through cross-examination.

After receiving the report of the independent fact-finding team, the hearing officer will decide the outcome of the appeal and will send written notification of his or her decision to the appellant by overnight mail within ten (10) working days of the date of receipt by the hearing officer of the report of the independent fact-finding team. Notification must be given that the appellant may submit a request for a state level appeal and/or hearing and that it must be made in writing within fifteen (15) working days of the receipt of the local determination (see next section).
If the appeal is granted, the review and approval process may be reopened at the appropriate point. The Board reserves the right to award charters on a conditional basis during the appeal period. At the Board’s discretion, final funding for all related proposals may await completion of the appeal process. The Board reserves the right, at any time, without penalty, to cancel the procurement or reject any or all proposals whenever a fair, open, and competitive process has been compromised, or when it is determined that such action is in the best interest of the Board.

B. State Appeals Process

If a local determination issued to the appellant does not resolve the appeal to the satisfaction of the appellant, to further appeal, the appellant must make a written request of appeal and/or request for a formal appeal hearing within 15 working days of receipt of the local determination to:

Office of the Director
MA Department of Career Services
Charles F. Hurley Building
19 Staniford Street
Boston, MA 02150
Attention: Complaint/Hearings Officer (C/HO)

A copy of such request shall simultaneously be sent to the Boston PIC.

The C/HO must make a written determination within 20 working days of receipt of the appeal/protest. The C/HO may choose to decide based solely on the information included in the case file or conduct further investigation before issuing a written determination. If the C/HO has made a written request to the appellant for additional information, the 20-working day period does not begin until the requested information has been received by the C/HO.

If the C/HO is unable to contact the appellant for the purposes of obtaining additional information needed to resolve an appeal, a written request for information must be sent via overnight mail or through some other form of communication where receipt can be verified. If an appellant does not respond, the C/HO must inform the appellant in writing that the matter is considered resolved based on the lack of response.

Formal Hearing Process:

If the C/HO deems that a formal hearing is necessary or if the appellant specifically requests such a hearing, the C/HO will notify the parties (in writing) that the matter has been scheduled for a formal hearing. The notice must inform the parties of the following conditions of the hearing process:

- The date, time, and location of the hearing.
- Instruction that the State Hearing Official (State Complaint Officer or other, duly authorized State Official) will conduct and regulate the course of the hearing to assure full
consideration of all relevant issues and that actions necessary to ensure an orderly hearing are followed.

- Instruction that the State Hearing Official must rule on the introduction of evidence* and afford the parties the opportunity to present, examine, and cross-examine witnesses.

Note: For clarity it must be noted that an administrative hearing is not the same as a court of law. Technical rules of evidence do not apply. It is up to the State Hearing Official to follow principles and procedures that are designed to assure credible evidence that can be tested through cross examination.

In conjunction with the hearing process, the State Hearing Official:

- May permit (at his/her discretion) the participation of interested parties (amicus curae) with respect to specific legal or factual issues relevant to the complaint/appeal.
- May choose to conduct the hearing at a specific location convenient to all parties (preferred) or, if that would represent a hardship for one or more parties, the State Hearing Official may elect to conduct the hearing by a telephone conference call.
- Must conduct the hearing and issue a written determination to the appellant, the respondent, and any other participating interested parties within the 20-working day period. The State Hearing Official’s written determination must include:
  - the results of the State level investigation
  - conclusions reached on the allegations; and
  - an explanation regarding the determination.
Section VII: Attachments

Attachment 1: Local MOU with mandated WIOA partners

Attachment 2: Boston Performance Measures

Attachment 3: Career Center Services
- Wagner-Peyser Services
- WIOA

Attachment 4: Definitions
A1: Local WIOA MOU

MassHire Boston Workforce Board and WIOA Partners
Umbrella Memorandum of Understanding
FY 2022 – FY 2024

I. PURPOSE

This Memorandum of Understanding (MOU) communicates the agreement developed and executed between the MassHire Boston Workforce Board, with agreement of Mayor of Boston (Chief Elected Official), and the MassHire Boston Career Center (MBCC) and MassHire Downtown Boston Career Center (MDBCC) required partners relating to the operation of the one-stop delivery of service in the local workforce area.

The MassHire Boston Workforce Board (hereinafter referred to as The Board or MBWB) will act as the convener of MOU negotiations and, together with OSCC Required Partners, will shape how local One-Stop Career Center Services are delivered.

This MOU defines the roles and responsibilities of the OSCC Required Partners to operationalize the delivery of services necessary to produce the best possible outcomes for shared customers – youth, job seekers, and businesses.

The MOU may include other provisions agreed to by all parties that are consistent with all Partner programs, services and activities authorizing statutes and regulations.

II. OSCC REQUIRED PARTNERS

In accordance with WIOA Section 121(c), this Local Memorandum of Understanding has been developed and executed with agreement of the Chief Elected Official, the Boston Workforce Board, and the Workforce Innovation and Opportunity Act (WIOA) OSCC Required Partners (hereafter referred to as “Partners”), as defined by WIOA in WIOA Regulations 20 CFR Part 678.400. as mandatory Partners in the One-Stop Career Center Centers and include:

1. The Adult Program (Title I), as part of the Department of Career Services (DCS), Executive Office of Labor and Workforce Development (EOLWD).
2. The Dislocated Worker Program (Title I), as part of DCS/EOLWD.
3. The Youth Program (Title I), as part of DCS/EOLWD.
4. The Wagner-Peyser Act Program (Wagner-Peyser Act, as amended by Title III), as part of DCS, EOLWD.
5. The Vocational Rehabilitation Program (Title I of the Rehabilitation Act of 1973, as amended by Title IV), as part of the Massachusetts Rehabilitation Commission (MRC) and
Massachusetts Commission for the Blind (MCB), Executive Office of Health and Human Services (EOHHS).

6. **Federal-state unemployment compensation program**, as part of the Department of Unemployment Assistance (DUA), EOLWD.

7. **Trade Adjustment Assistance for Workers Programs** (Activities authorized under chapter 2 of Title II of the Trade Act of 1974 (19 U.S.C. 2271 et seq.)), as part of DCS, EOLWD.

8. **Jobs for Veterans State Grants Program** (Programs authorized under 38, U.S.C. 4100 et seq.) as part of DCS, EOLWD.

9. **Temporary Assistance for Needy Families Program** (42 U.S.C. 601 et seq.) as part of Department of Transitional Assistance (DTA), EOHHS.

10. **Employment and Training Programs under the Supplemental Nutrition Assistance Program**, (Programs authorized under section 6(d)(4) of the Food and Nutrition Act of 2008 (7 U.S.C.2015(d)(4)), as part of DTA, EOHHS.

11. **Senior Community Service Employment Program** (Programs authorized under Title V of the Older Americans Act of 1965 (42 U.S.C. 3056 et seq.))

12. **Ex-Offender program** (Sec212 of the **Second Chance Act** of 2007)

13. **Job Corp**

14. **The Adult Education and Family Literacy Act Program** (Title II), as part of Adult and Community Learning Services (ACLS), Department of Elementary and Secondary Education (DESE) Executive Office of Education (EOE) and represented by 18 community partners listed:

- Action for Boston Community Development/Boston (Parker Hill, Roslindale, Mattapan)
- Asian American Civic Association Inc.
- Boston Public Schools
- Bunker Hill Community College
- Catholic Charitable - El Centro, Haitian Multi-Service Center, Laboure`
- Charlestown Community Center
- East Boston Harborside Community Center
- International Institute of New England
- Jackson Mann Community School & Council, Inc.
- Jamaica Plain Community Center
- Jewish Vocational Service, Inc.
- Mujeres Unidas Avanzando
- Project Hope of Boston, Inc.
- Suffolk County Sheriff’s Department
- YMCA International Learning Center Greater Boston
- North American Indian Center of Boston
III. DURATION OF THE MOU
WIOA Section 121(c) (g) requires that the MOU shall be reviewed not less than once every 3-year period to ensure appropriate funding and delivery of services, including effectiveness, physical and programmatic accessibility. WIOA Regulations Subpart C 20 CFR Part 678.500 further requires MOU renewal following the 3-year review if substantial changes have occurred.

This agreement shall commence on July 1, 2021, and terminate on June 30, 2024, unless superseded or terminated by agreement of all parties.

IV. ASSURANCES
The MassHire Boston Workforce Board and the OSCC Partners agree to conduct the following activities at a local level:

1. Enter into a local MOU with the Local Workforce Development Board relating to operation of the one-stop delivery system.

2. Participate in the operation of the one-stop delivery system consistent with the terms of this MOU, the requirements of WIOA, and the requirements of Federal laws authorizing the programs and activities.

3. Define “shared” customers between Partners to create a clear understanding of how multiple providers, services, and resources should support youth, job seekers, and businesses.

4. Redesign the One-Stop Career Center customer flow and service practices across partner agencies to ensure the accessibility and availability of services to “shared” customers.

5. Utilize robust technology tools to scale-up practices and provide greater supports for individuals with barriers to employment including basic skills assessment, remediation, and career development tools.

6. Monitor and evaluate program outcomes for individuals facing barriers to employment on an annual basis.

7. Use a portion of the funds available for programs and activities to maintain the one-stop delivery system, including infrastructure and shared costs of One-Stop Career Centers, through methods agreed upon by the Local Board, Chief Elected Official, and Partners. If, however, no such consensus is reached, the Governor, in consultation with the Chief Elected Official, Local and State Boards, shall determine the portion of funds to be provided (WIOA sec. 121(a) (h) (1) (C)).

8. Where possible, provide representation on local workforce boards, and/or participate in Local Board ad hoc activities/events, or on standing committees.

9. Convene locally as an MOU Team at least quarterly and agree to the roles and responsibilities each Partner will have in the development of a diversity, equitable, and inclusive integrated service delivery strategy that meets the needs of customers and businesses.

10. The MOU will be reviewed and, if substantial changes have occurred, renewed not less than once in every 3-year period to ensure appropriate funding and delivery of services. The MOU must be updated to reflect any change in the One-Stop Partner infrastructure cost contributions.
V. MOU PROCESS

The Workforce Innovation and Opportunity Act (WIOA) Sec. 121 (c) and WIOA Regulations 20CFR Parts 678.500-510 require that a Memorandum of Understanding be executed between MassHire Boston Workforce Board and the One-Stop Career Center (OSCC) Partners, with the agreement of the chief elected official.

In 2018, the Board convened monthly meetings of OSCC required Partners and non-required Partners to develop an umbrella MOU to shape the delivery of local One-Stop Career Center Services. Each partner gave a presentation on their program: the populations served, their role in the workforce system, and how they could both utilize and expand career center services. Each agency designed a customer flowchart for service delivery, identifying the “shared” customer, and their role at the OSCC. The Partners reached agreement on services to shared customers and continued to meet quarterly to review systems, outcomes, and identify best practices.

VI. MASSHIRE BOSTON CAREER CENTERS (American Job Centers)

The Boston MBCCs (MDBCC and MBCC) approach serving WIOA customers is an integrated service model. This model requires integration of the customer pool – individuals coming to the career centers are "our" shared customers. The centers are committed to establishing an integrated service flow for customers. The goal is to provide services that meets the needs of the customers – regardless of funding source. Staff at each career center will work to engage the partner agency staff as a service team, providing all resources available to the customer from a variety of sources, and building a customer centered solution for all WIOA customers.

This MOU is a commitment between the career centers and the WIOA partners to collaborate on serving shared customers. One-Stop Career Centers will:

1. Create a transparent customer flow process and determination of eligibility for Wagner-Peyser and WIOA customers
   - Coordinate with WIOA partners to create a shared customer process flow
   - Designate a lead staff member to work collaboratively with colleagues at partner agencies on behalf of shared WIOA clients
   - As appropriate, attend partner program orientations and identify shared customers
   - Establish referral mechanisms between OSCC and WIOA partner agencies
   - Train partner agency staff on programs and services of the OSCC

2. Provide Individualized services to WIOA eligible customers referred from partner organizations
• Collaborate with partner agency staff to ensure that shared customers are appropriately triaged to receive tailored and relevant job readiness, job matching, coaching, and employment supports.

3. Assign a staff member/s as a direct point of contact for each WIOA partner

• Cross train designated OSCC staff and WIOA partner staff to insure a clear understanding of roles and responsibilities

4. Data sharing

All co-located staff should have access to MOSES. OSCC staff and co-located partner agencies will document participation of shared WIOA customers using the MOSES database, including placements and outcomes. OSCC will generate reports as agreed upon with partners

5. Provide accommodation for WIOA partners to co-locate on a schedule and frequency that is mutually agreeable and based on available space at OSCC

6. Co-located partner staff will provide support, information, and resources to OSCC staff and shared WIOA customers

7. Lead and participate in MWB organized quarterly meetings to discuss MOU operationalization with WIOA partners

VII. PRIORITY POPULATIONS

To be a shared customer, an individual must meet the eligibility criteria of the career center and the partner agencies. The eligibility criteria for shared customers will vary by organization depending on the partner services, participant characteristics (e.g., academic level, level of English proficiency), and regional employment needs (e.g., healthcare, hospitality, advanced manufacturing).

a) Unemployment Insurance Recipients

Individuals receiving Unemployment Insurance represent 50% of the current customer base at the Boston career centers. Most of these customers attend the career centers to complete the RESEA program. The number of unemployed (with or without DUA) customers using the career centers is 94%. On average Boston career centers accommodate customers with higher levels of educational attainment. 32% of Boston UI claimants have a High School degree or GED, 22% have some college or vocational training, and 32% have a bachelor’s degree or higher. The industries with the highest number of claimants include Administration and Support Services, Construction, Hospitality, and Health and Social care.

Shared customers are claimants who are WIOA eligible and are required to attend both Career Center Seminar and RESEA services.

Referral: The career centers serve on average 7,500 UI claimants through the RESEA program. Both DUA and the career centers will ensure that the re-employment goals of the UI claimants are embedded within its job seeker/customer flow strategy.
Access to re-employment services will be available through the one-stop career center and will include:

- UI eligibility services
- Eligibility assessments
- UI Claimant registration for employment services
- Assistance in finding a job
- Placement services
- Refer and assist UI Claimants with training and education resources and programs.

DUA staff will contribute to an integrated service delivery strategy at the OSCC by:

- Provision of OSCC staff training in assisting claimants to navigate the UI process.
- Co-location of staff at selected OSCCs.
- Support OSCC staff to assist UI claimants in applying for UI benefits online.
- Ensuring OSCC visitors have access to “meaningful assistance” from UI staff to resolve issues and questions relating to their claim.
- UI Staff will support OSCCs with administration of required RESEA services.

Any other provision in this agreement notwithstanding:

1. DUA only is authorized to provide information under this agreement to another party to this agreement:
   a. upon the determination by the DUA Director that the information lawfully may be provided in accordance with applicable law, including, but not limited to, G. L. c. 151A, § 14P and § 46, and 20 C.F.R. Pt. 603.
   b. following approval by DUA of an Application for Unemployment Insurance and/or Wage Reporting Data, and
   c. following execution by DUA and an approved applicant of a Data Sharing and Cost Reimbursement Agreement.

2. DUA will not be bound by any provision of this agreement that does not expressly mention DUA by name.

b) Low-Income Adults including TANF and SNAP

Boston Transitional Assistance Offices (TAO), based at Nubian Square / Newmarket Square, expect to refer a number of participants to career centers for services based on the volume of customer needs, the needs of the local catchment area, and with the representation and engagement of partner DTA Staff.

Each DTA, TAO, and career center will designate a lead person to work together on behalf of the shared customer. DTA will refer customers to the career center for services where they will be provided with an eligibility assessment before being enrolled in WIOA. Information on funded DTA programs, services, and resources will be made available at the OSCCs.
The Local TAO will:

- Co-locate DTA staff in person or virtually at the OSCC to provide additional support, information, and resources to OSCC staff and DTA clients on a schedule and frequency to be determined
- Support OSCC staff participation in DTA client orientations, share information regarding OSCC services, and recruit participants.
- Train OSCC staff on the eligibility, work participation, resources, supportive services, and other requirements of the TAFDC and SNAP Programs.
- Establish formal referral mechanisms between DTA and the OSCC.
- Collaborate to address any challenges for TAFDC and SNAP clients to participate in OSCCs activities, such as, transportation and childcare.
- Collaborate to ensure that TAFDC and SNAP clients receive tailored and appropriate job readiness, job matching, coaching, and employment supports.

The OSCC will:

- Dedicate staff liaison for DTA and DTA clients; trained and knowledgeable about DTA programs/requirements.
- Make available information on DTA programs, services, and resources.
- Ensure OSCC staff training to respond to and/or make referrals for current or potentially eligible DTA clients about programs, services, and resources available through DTA.
- Attend DTA Orientations and recruit DTA clients.
- Designate space for DTA Full Engagement Worker to co-locate at agreed upon scheduled times.
- Establish a case record for each participant documenting activities, records, evaluations, test results and case narratives.
- Document DTA client participation including placements and outcomes, and generate a report to DTA based on an agreed format and frequency.
- Review, verify and sign DTA client participation forms for OSCC registered DTA clients.

*Shared customers* are clients considered “work ready” and who may come from both the exempt and non-exempt pool of clientele as exempt clients may volunteer to do job search, especially those who were recently employed. Customers that only receive SNAP benefits in both catchment areas may also become customers of the OSCCs.

c) Adult Education Participants

Boston has eighteen DESE funded ABE agencies providing a range of ABE and ESOL programs. An estimated 74,000 residents have less than a high school diploma, not including 15% to 25% of H.S. graduates with limited literacy and math skills; their limited basic skills impede their efforts to succeed in higher education and enter careers that pay a living wage and afford opportunities for advancement. There are currently 3,430 residents enrolled in programs with 47% of the students working, and 46% seeking employment.
Adult and Community Learning Services (ACLS) ensures meaningful access to adult Basic Education (ABE) services at the Boston area OSCC by funding a Career Navigator co-located at each center. The role of ABE out stationed staff is to serve as a liaison between regional ABE programs and local OSCCs. The out stationed staff is expected to:

- schedule and maintain posted hours at their assigned OSCC and be available by phone or email on days when not on site
- develop and monitor a two-way referral system with OSCC staff
- maintain accurate records of customer intakes, assessments, referrals, and other services
- connect eligible ABE students looking for employment or training to OSCCs
- train OSCC staff on ABE program intake, assessment, and referral procedures
- take OSCC walk-in customers and phone calls when on-site
- disseminate information about OSCC services to regional ABE programs (e.g., make presentations at ABE programs, organize informational trips to OSCCs)
- provide accurate and comprehensive information about OSCC services

Shared customers are ABE/ESOL students who enrolled in more than one core partner program at any time during a fiscal year. Criteria for shared customers is proof of right to work in the US, SPL 4+, GLE 9-12, and on track to get a high school diploma or equivalent in 6 months.

Referral to OSCC: ABE programs anticipate registering 121 students ABE/ESOL students at the MassHire Career Centers. Educational providers will assist customers to enroll in Job Quest and make a direct referral to the ABE Career Center Navigator.

Referral to ABE/ESOL Programs: ABE programs anticipate 119 referrals from MassHire Career Centers. Of the referrals from MassHire Career Centers, Boston ABE/ESOL programs anticipate 28 students to enroll in classes.

d) Massachusetts Rehabilitation Commission

MRC is a required partner and will participate in the local area and will contribute to the local service delivery strategies. MRC will provide information regarding our services and will contribute vocational counseling and guidance for eligible consumers. MRC counselors will develop individual employment plans and services to assist consumers to establish a vocational goal toward competitive integrated employment and will monitor the plan to completion.

MRC local area assigned staff worked with the workforce team to establish a schedule of meetings and agenda as well as a course of action resulting in a successful MOU. Career Pathway services were established for all populations served along with shared definitions of consumers. MRC’s responsibility as part of the MOU will be to provide vocational and rehabilitation employment services for people with disabilities determined eligible for our services in each local area. MRC provided input to each local team to establish the process utilized to develop and complete the MOU.
MRC serves individuals with disabilities identified as part of the population served under WIOA. To receive MRC services, these individuals must meet eligibility requirements. MRC assists these individuals in obtaining competitive integrated employment and to that end, services provided are based on individuals needs and could include but are not limited to:

- Assessment
- Counseling and guidance
- Job placement
- Training, education, and financial assistance towards post-secondary education
- Adaptive equipment and extended supports

**Continuum of Services for MRC Priority Populations**

The priority population might benefit from these services by participating in job driven trainings based on industry needs in the local labor market. MRC will collaborate with our workforce partners to meet the individual needs of shared consumers. Career Centers must ensure that facilities, technology, and training curricula are accessible for individuals with disabilities. MRC will provide subject matter expertise to the Career Centers to address accessibility issues based on individual needs such as Dragon, JAWS, ASL, and other adaptive equipment and devices.

**Plan for Coordinated Staff Development and Training**

MRC will provide orientation to our services to Career Center staff and will participate in Career Center information training sessions to ensure appropriate referrals and ongoing information sharing between Partner program staff. MRC will track individuals referred to and from the Career Centers and those determined eligible for services and have a plan for employment in our case management system (MRCIS). MRC can run reports on shared customers and can provide information on a regular basis to our partners as needed until such time as we have a system that can capture information across partnering agencies such as a dashboard.

**Shared Customers:** MRC will track individuals referred to and from the Career Centers and those determined eligible for services and have a plan for employment in our case management system (MRCIS). MRC can run reports on shared customers and can provide information on a regular basis to our partners as needed until such time as we have a system that can capture information across partnering agencies such as a dashboard. MRC can provide career counseling and guidance, assessments, referrals, training, job placement, education, financial assistance towards post-secondary education, and adaptive equipment for eligible consumers. These will be incorporated into a career pathway plan along with services that might be provided by our partnering organizations based on our shared consumer's needs. Individuals with disabilities might need ESL classes, adult basic education, or can benefit from TANF/SNAP, transition services from schools, pre-employment services, and other opportunities offered by our partner organizations.
**Referrals:** MRC will ensure appropriate referrals for the continuum of services offered or available through our partners in the local service areas. MRC provides these services to individuals determined eligible under federal VR standards.

**e) Massachusetts Commission for the Blind**

Access to MCB programs, services, and resources will be made available at all OSCCs. Local areas will determine how MCB programs and services are accessed through the OSCCs based on the volume of customers and the availability of MCB staff. Legally Blind and visually impaired or consumers will receive access to MCB services at the OSCCs in one or more of the following ways:

- Based on need, MCB staff will be physically present at the OSCC to provide services.
- OSCC staff will be appropriately trained to provide information to legally blind and visually impaired consumers about programs, services, and activities available through MCB.
- OSCC staff will make a direct link between the legally blind and visually impaired consumer and MCB staff to schedule an appointment, or to receive useful information about programs and services.

MCB will support an integrated service delivery strategy in which OSCC staff will provide career center services to legally blind and visually impaired customers by:

- Assisting the Local Boards with training OSCC staff to use assistive technology with visually impaired or legally blind consumers who seek career center services.
- Providing training to OSCC staff on accessibility requirements for legally blind and visually impaired consumers.
- Assisting with accommodations related to workshops for legally blind and visually impaired consumers.
- Providing training to OSCC staff so that staff have basic knowledge of programs, services, and resources available through MCB.
- Ensuring that MCB Employment Services Representatives and OSCC Business Service Representatives collaborate so that legally blind and visually impaired consumers receive appropriate job matching by reviewing consumers skills, communicating employer qualifications and organization culture, and sharing employer contacts.
- Providing sensitivity training to OSCC staff.

**Shared Customers:** Legally blind and visually impaired consumers who seek career center services through the One-Stop Career Centers (OSCCs).
**Referrals:** MCB Regional Directors will work in partnership with the local career center staff to establish a single point of contact for referrals to/from the career centers.

**f) Youth with Barriers to Employment**

The goal of Boston’s WIOA youth system is to ensure that youth who are not being effectively served in mainstream education and workforce development systems have the skills and credentials necessary to access career-oriented employment. Overall, 75% of WIOA Youth funding must be spent on out-of-school youth, and 20% on employment. The Mayor’s Office of Workforce Development (OWD) allocates WIOA Youth funds to community-based agencies that provide alternative education, career exploration, training, and employment to at-risk youth ages 16 – 21.

- The WIOA youth providers (CBOs) screen youth for WIOA eligibility, and will refer those who are 18 and older to career centers for job readiness and employment services
- The career centers refer youth ages 16 and 17, as well as young adults ages 18-24 to WIOA youth providers, as appropriate
- WIOA youth providers and career centers collaborate on joint job readiness and career exploration workshops, hosted either at the career centers or at the CBOs.
- WIOA youth providers bring youth to job fairs and on-site recruitments organized by the career centers.
- Youth providers recruit for programs through career centers.
- Both WIOA youth providers and career centers count outcomes for youth 18-24 who youth enter employment; both track retention after 6 months and 12 months

**Shared Customer:** 18-24-year-old in need of education and/or employment

**Referral:** The youth providers (CBOs) screen youth for WIOA eligibility and will refer those who are 18 and older to career centers for job readiness and employment services.

**g) Youth Build Boston**

The mission of Youth Build Boston is to give Boston youth between the ages of 16 and 24 the tools, skills, and experience necessary to access a career in the building trades. Our goal is to recruit, screen and enroll 24 youth each year, credential them in OSHA 10 and the National Center for Construction Education and Research (N.C.C.E.R.), instruct them so that they pass all five Hi SET exams to earn their HSE credential and be exposed to at least 20 hours monthly of life skills, leadership development and community service activities.

Applicants and enrollees are low-income, homeless, DCF or DYS involved, youth or adult offenders or disabled high school dropouts testing between 6th and 12th grade reading and math levels. Youth also have disproportionate levels of exposure to crime, violence, and trauma.

Participants receive academic instruction in math, science, social studies, reading and writing, case management and career interest assessments and counseling, vocational training on new
construction or rehabbed housing, stackable, and industry-recognized building trades credentials including OSHA 10, and N.C.C.E.R. Youth receive biweekly stipends, uniforms, tools, breakfasts and snacks, and access to the AmeriCorps Membership and an AmeriCorps Education Award during their time enrolled in the program.

The U.S. Department of Labor, and Massachusetts Department of Elementary and Secondary Education is the core funding for Youth Build’s Building Trades Exploration program.

*Shared customer: 16–24-year-old in need of education and/or employment*

*Referral:* Youth Build Boston will refer to the point person at the career centers for intake and assessment.

**h) Veterans**

Veterans’ Representatives from the Disabled Veterans' Outreach Program (DVOP) of the Department of Career Services are co-located at the one-stop career centers to provide timely career services. Veterans receive priority of service status and will be provided immediate access to career center services. The Partners will refer Veterans to the one-stop career centers for services.

**i) Older Worker**

The Senior Community Service Employment Program (SCSEP) is a community service and work-based job-training program for older Americans. Operation ABLE and Greater Boston Chinese Golden Age Center (GBCGAC), the Boston SCSEP providers, provide training for low-income, unemployed seniors and collaborates with One-Stop Career Centers (OSCC) to maximize opportunities for participants to obtain workforce development, education, and supportive services to help them move into unsubsidized employment. The GBCGAC program provides services to primarily Asian older workers.

Operation ABLE will:

- Make every effort to place a staff person at the OSCCs for a set number of hours per week to provide SCSEP program information or services to customers and staff.
- Develop and monitor processes and procedures with OSCC staff and the SCSEP programs in the region on how customers will be identified and referred to SCSEP
- Maintain accurate records of customer intakes, assessments, IEPs, community services assignments, referrals, and any other service provided
- Provide referrals to WIOA intensive and training services and access to other activities and programs carried out by other One-Stop partners

Greater Boston Chinese Golden Age Center will:

- Coordinate services to help Asian SCSEP clients register in Job Quest
- Work with OSCC’s staff to offer specialized Career Center Seminars to Asian SCSEP clients
- Provide referrals to WIOA intensive and training services
**Shared Customer:** SCSEP individuals looking for employment or training who enroll in the OSCC and receive services from both agencies

**Referral:** Customer enrolled in Career Center as part of SCSEP enrollment.

**j) North American Indian Center of Boston**

The North American Indian Center of Boston Inc. (NAICOB) will contribute to the local service delivery strategies in the Boston workforce development area. NAICOB will provide information regarding services and will contribute participant outreach and recruitment to eligible consumers. NAICOB WIOA staff will develop individual employment and educational plans and services to assist consumers in establishing goals towards competitive integrated employment and training plans and support services.

As a priority population, NAICOB requests the designation of the WIOA Employment and Training Strategic Plan for adults starting July 1, 2018. This grant will allow NAICOB to maintain their services to the Massachusetts Indigenous and Native American population in the following Massachusetts counties: Berkshire, Essex, Franklin, Hampden, Hampshire, Middlesex, Norfolk, Suffolk, and Worcester Counties.

The North American Indian Center of Boston Inc. (NAICOB) has successfully operated JTPA and WIA Employment and Training Programs since July 1, 1993. The mission statement of NAICOB is to promote greater self-determination, socio-economic self-sufficiency, spiritual enhancement, intercultural understanding, and other forms of empowerment for the North American Indian Intertribal community and to assist North American Indians in obtaining an improved quality of life by providing health connections, job training, education, housing, and other related programs and social services.

The Plan of the North American Indian Center (NAICOB) WIOA Department of Boston will incorporate the principles of the Department of Labor’s comprehensive “Career Pathways” approach. WIOA’s plan is to enable Native individuals to become economically self-sufficient and move into the middle class through education and employment, which will enable participants to provide a better life for their families and strengthen Native communities.

- Participant Outreach and Recruitment
- Assessment and Enrollment
- Education and Training (classroom and non-classroom related).
- Job Placement and Employment; and
- Individual Case Management and Follow-Up Support Services to Enhance Participant Hiring and Retention.

The NAICOB WIOA Employment and Training Department provides services, which will enable our low-income, dislocated participants to become competitive in an extremely focused job market of aptitudes and abilities, a challenge for the urban Native American community located in Boston and surrounding counties of Massachusetts. Massachusetts’s is embarking on a unique time in our history, where equal
pay for equal work will become law July 1, 2018. This gender-pay-equity law catapults employment diversity as a function of opportunity and equity for our participants. There remains a talent pool to receive better education, wages, and training to be aligned in a workforce and prevail in this quickly evolving economy.

Shared Customers: NAICOB WIOA programs will geographically serve Native American’s that are self-identified from the Career Centers and those determined eligible for services and a have a plan for employment in its case managements system by providing career counseling and guidance, assessments, referrals, training, job placement, education, support services and adaptive equipment for eligible consumers. These will be incorporated into a career pathway plan along with services that might be provided by Partners based on the shared consumers’ needs. Individuals with disabilities might need adult basic education and pre-employment services, apprenticeship that connect to job and job-related skills and other opportunities offered by Partners.

Referral: NIACOB will ensure appropriate referrals for the continuum of services offered or available through Partners in the local service areas. WIOA offers these services to individuals determined eligible under WIOA.

VIII. SERVICE TO EMPLOYERS

All core WIOA partners are members of the Boston Workforce Development Board and are engaged in the oversight and management of the local career center system. They also hold responsibility for leveraging employer relationships at all levels of service within the local area. The Board engages employers through sector initiatives as envisioned by the Massachusetts business engagement model, Demand 2.0. It convenes forums of employers, education, and workforce development practitioners in the Healthcare and IT fields to identify gaps and opportunities for growth. These forums allow for a real time discussion of both the employer needs and ways to address skill gaps in high demand sectors.

Career centers provide a continuum of services to employers through the business service teams. They assist employers to:

- Find talent through outreach, recruitment, business incentives, and connecting them with Apprenticeships and On-the-Job (OJT) programs
- Develop and maintain a workforce through tax incentives and workforce training programs
- Mitigate the impact of downsizing by working with Rapid Response teams to provide training and reemployment services
- Connect with community partners to provide work readiness support such as transportation, childcare, and clothing.

WIOA partners will work with the OSCC’s to maximize business engagement in Boston and as such, commit to working collaboratively to:

- Share labor market information
- Disseminate job opportunities to partners
- Participate in joint recruitment and job fairs
• Share resources that benefit customers
• Where possible streamline the employer engagement to a single point of contact
• Share placement and hire information as appropriate
• Educate partners on benefits available to employers

IX. TECHNOLOGY

Technology is an essential tool in the management of shared customers throughout the workforce system. Career services are now available in two OSCC locations, with expanded access through partner organizations and One Stop Access Points. Phase Two of this MOU development will include technological enhancements that allow interfaces of common information needs, including customer tracking, common case management, reporting, and data collection.

OSCC’s will provide:

• Data tracking and case management through MOSES
• Access to MOSES off-site through Citrix connectivity
• ZoomText screen magnification software
• JAWS speech software
• Large print materials
• MS software on computers and laptops
• Barcode scanning for tracking service
• Mobile barcode scanners for off-site activity
• Online registration for workshops
• Mass Job Quest and Transferable Occupational Relationship Quotient (TORQ) for online job search assistance
• Career Readiness 101
• Online Labor Market Information

Tools Future plans

• To expand virtual access by conducting remote Welcome Sessions and workshops
• Enhanced virtual services

MH Boston CC operating hours are:

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X. **Training and Staff Development**

All Partners agree to participate in training and staff development activities that will enhance their understanding of the service delivery system designed for the “shared” customer. Training may include workshops, webinars, peer-to-peer trainings, best practice materials, and other sources identified by Partners. Partners will provide training content material for staff cross training.

XI. **Competitive Selection of MassHire Boston Career Centers**

The WIOA Required Partners agree to participate in the selection process of MassHire Operators as required by WIOA, at least once every 4 years.

XII. **FUNDING AND SHARED INFRASTRUCTURE COSTS OF THE OSCC**

The Parties of this MOU agree that all required partners have a joint funding responsibility to support and maintain an effective local integrated service delivery system. In addition, all parties to the MOU recognize that shared and infrastructure costs are applicable to all required Partners. As such, all parties to this agreement acknowledge that the Local MOU herein serves the purpose of the infrastructure funding agreement (IFA) as required by WIOA. The infrastructure funding agreement as described will be revisited on an annual basis and periodically reconciled against actual costs incurred and adjusted accordingly to ensure that it reflects a cost allocation methodology that demonstrates how infrastructure costs are charged in proportion to relative benefits received. Infrastructure funds are apportioned at the state level based on the percentage of shared customers served in each local workforce area. State Partners will establish a methodology that will ensure costs are allowable, reasonable, necessary, and allocable. As appropriate, State Partners will enter into Inter-agency Service Agreements (ISAs) or Contracts with the MassHire Department of Career Services (MDCS), as the designated State Workforce Agency (SWA), to issue the local allocations. Local Boards will ensure all allocations are incorporated into the local integrated budget during the annual planning process. MDCS will monitor the spending of all shared and infrastructure costs and Local partners agree to meet regularly to discuss integrated service delivery strategies and the shared and infrastructure funds needed to actualize services. On an annual basis, local partners will provide suggestions and recommendations to state level partners for adjustments to shared and infrastructure funds allocated. The utilization of infrastructure funds will be reviewed on a quarterly basis. Staff time and in-kind resources attributed to shared costs will be reviewed annually for necessary adjustments.”

XIII. **DATA SHARING FOR INTEGRATED SERVICE DELIVERY FOR SHARED CUSTOMERS**

Subject to applicable legal constraints, including but not necessarily limited to those contained in G. L. 151A and 20 C.F.R. Pt. 603, the parties of this MOU agree to seek increased sharing of data with a view to improving the quality of service-delivery to both jobseekers and business-customers. The Party whose data is requested to be shared
shall be the judge, in its sole discretion, of the legal constraints governing whether and how its data may be shared. The parties of this MOU understand that a shared data system is being designed at the state level and will fully support the development and implementation of a state-level data system, subject to the foregoing limitations.

XIV. PERFORMANCE MEASURES

The Board, in partnership with the OSCC Partners, agree to jointly review the WIOA mandated performance indicators for the workforce areas, or metrics negotiated as part of any shared and infrastructure contract costs between a Local Board and the mandated One-Stop Career Center partner, including incentives and penalties.

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<tr>
<td>Measurable Skill Gains</td>
<td>During program year achieve documented skill gain from education/training</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employers</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effectiveness in Serving Employers</td>
<td>Increase in new employers</td>
</tr>
</tbody>
</table>
Effectiveness in Serving Employers  Retention rate of repeat employers
Effectiveness in Serving Employers  Industry penetration rate

XV. AMERICANS WITH DISABILITIES ACT AND AMENDMENTS COMPLIANCE

The Partners of this MOU agree to ensure their policies, procedures, programs, and services are in compliance with the Americans with Disabilities Act of 1990 and its amendments, in order to provide equal access to all customers with disabilities. Additionally, Partners agree to fully comply with the provisions of WIOA, Title VII of the civil Rights act of 1964, the Age Decimation Act of 1975, Title IX of the Education Amendments of 1972, 29 CRF Part 37, and all other regulations implementing the aforementioned laws.

XVI. MODIFICATIONS TO MOU

a) The MOU may only be modified by mutual agreement of the WIOA Partners and the Boston Private Industry Council (example: funding changes). Any such modification must be preceded by a 30-day written notice to all Partners of the intent to modify this agreement, the purpose of such modification, and the Workforce Development Board meeting at which the modification will be discussed.

b) Any individual party to the umbrella MOU may request a modification to the agreement by making such request in writing to the Board. If such a request affects any other party to the agreement, the Board will provide notification to the other parties.

c) The MOU may be modified at any time to include additional Partners (mandatory or non-required) who will sign the agreement and appropriate attachments at the time they are being added. All parties to the umbrella MOU will be notified in writing of the intention to add parties to the agreement.

d) If a Required WIOA Partner appeal to the State regarding infrastructure costs results in a change to the Partners infrastructure cost contributions, the MOU must be updated to reflect the final One-Stop partner infrastructure contributions [WIOA §678.500(e)].
### A2: Boston Baseline Measures – All Centers.

Performance Measures FY 2020 – FY23

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program Activity in MOSES</strong></td>
<td><strong>FY2020</strong></td>
<td><strong>FY2021</strong></td>
<td><strong>FY2022</strong></td>
<td><strong>Goal FY2023</strong></td>
<td></td>
</tr>
<tr>
<td><strong>A. Job Seekers Services</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Total Job Seekers Served</td>
<td>11,459</td>
<td>8,065</td>
<td>8,316</td>
<td>9,158</td>
<td></td>
</tr>
<tr>
<td>a. Total Job Seekers Unemployed</td>
<td>10,402</td>
<td>7,174</td>
<td>7,529</td>
<td>8,115</td>
<td></td>
</tr>
<tr>
<td>b. Persons with Disabilities</td>
<td>830</td>
<td>506</td>
<td>615</td>
<td>708</td>
<td></td>
</tr>
<tr>
<td>c. UI Claimants Served</td>
<td>5,899</td>
<td>4,923</td>
<td>4,563</td>
<td>4,906</td>
<td></td>
</tr>
<tr>
<td>d. Veterans Served</td>
<td>395</td>
<td>209</td>
<td>231</td>
<td>316</td>
<td></td>
</tr>
<tr>
<td>e. Entered Employment *</td>
<td>1,708</td>
<td>880</td>
<td>1,190</td>
<td>1,250</td>
<td></td>
</tr>
<tr>
<td><strong>B. Employer Services</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Total Employers Served (= 1.a + 1.b)</td>
<td>778</td>
<td>864</td>
<td>722</td>
<td>750</td>
<td></td>
</tr>
<tr>
<td>a. New to Career Center</td>
<td>434</td>
<td>537</td>
<td>398</td>
<td>410</td>
<td></td>
</tr>
<tr>
<td>b. Repeat</td>
<td>344</td>
<td>327</td>
<td>324</td>
<td>340</td>
<td></td>
</tr>
</tbody>
</table>

*Entered employment count is the number of customers who report their employment to the career center. The actual number is published approx. 9 months later.
A 3: Career Center Services

Wagner-Peyser Services

The Wagner-Peyser funds are available to provide a variety of employment related labor exchange services, including but not limited to:

- job search assistance
- job referral
- placement assistance for job seekers
- re-employment services to unemployment insurance claimants; and
- recruitment services to employers with job openings.

Services are delivered in one of three modes including self-service, facilitated self-help services and staff-assisted service delivery approaches. Depending on the needs of the labor market, other services, such as job seeker assessment of skill levels, abilities and aptitudes, career guidance when appropriate, job search workshops and referral to training, may be available.

The services offered to employers, in addition to referral of job seekers to available job openings, include:

- assistance in development of job order requirements
- matching job seeker experience with job requirements
- skills and other attributes
- assisting employers with special recruitment needs
- arranging for job fairs
- assisting employers analyzing hard-to-fill job orders; and
- assisting with job restructuring and helping employers deal with layoffs.

Job seekers who are veterans receive priority referral to jobs and training, as well as special employment services and assistance. In addition, the system provides specialized attention and service to individuals with disabilities, migrant and seasonal farmworkers, ex-offenders, youth, minorities, and older workers.

WIOA Career Services

Under WIOA, the Department of Labor classifies Career Services into four categories: basic career services, individualized career services, training, and follow-up.

1. Basic Career Services

All Career Center job seekers are eligible to take advantage of WIOA basic career services. Basic
career services are general services assisting job seekers in finding gainful employment, and orienting job seekers to WIOA services and procedures, as well as providing information on the labor market and unemployment insurance. The mandated partners of WIOA individually or in some combination may provide these services. Under WIOA, basic career services must be made available to all individuals seeking services through the entire workforce delivery system and include the following:

a. Determination of whether the individual can receive assistance from the adult, dislocated worker, or youth programs
b. Outreach, intake (including worker profiling), and orientation to information and other services available through the entire workforce delivery system
c. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skill gaps) and supportive service needs
d. Labor exchange services including:
   i. Job search and placement assistance; and individual career counseling as needed, including the provision of information on in-demand sectors and occupations and on non-traditional employment
   ii. Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the entire workforce delivery system
e. Provision of referrals to and coordination of activities with other programs and services including programs and services within the Career Center system and when appropriate, other workforce development or human services programs
f. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas including:
   i. Job vacancy listings in labor market areas
   ii. Information on job skills necessary to obtain vacant jobs listed; and
   iii. Information related to local occupations in demand and the earnings, skill requirements and opportunities for advancement for those jobs
g. Provision of performance information and program cost information on eligible providers of training services by program and type of providers
h. Provision of information about how the local area is performing on performance accountability measures, as well as any additional performance information relating to the entire workforce system and the Career Centers
i. Provision of information relating to the availability of supportive services or assistance and appropriate referrals to those services including childcare; child support; medical or child health assistance available through the state, Supplemental Nutrition Assistance Program (SNAP) benefits; assistance through earned income tax credits; and assistance under Temporary Assistance for Needy Families (TANF), including supportive services and
transportation

j. Assistance in establishing eligibility for programs of financial aid assistance for training and or education programs not provided under WIOA.

k. Provision of information regarding filing claims under Unemployment Insurance programs, including Meaningful Assistance to individuals seeking to file a claim.

i. “Meaningful Assistance” means:
   • Assisting on-site using staff who are trained in unemployment compensation claims filing and the rights and responsibilities of claimants; or
   • Providing assistance by phone or technology as long as the assistance is provided by trained and available staff and within a reasonable time frame.

ii. The costs associated in providing meaningful assistance may be paid for by the Unemployment Insurance program, WIOA, Wagner-Peyser or some combination of these funding sources.

In addition to the minimum basic career services required under WIOA, the following is required:

**Resource Area:** Career Centers must maintain a publicly accessible resource area (including access for persons with disabilities) as part of their WIOA services. This public space and the resources available within it should include computers with Internet access; tutorials for career exploration, job searching and resume writing; job postings; and periodicals, information on Unemployment Insurance eligibility and services. They will provide information on financial aid for local non-WIOA training, labor market reports, educational programs, and information on partner programs. Individuals may receive self-service or informational activities without an eligibility determination. Self-service or informational activities include, but are not limited to, access to the resource room, online materials, reference documentation, workshops, employer screenings and job fairs. Knowledgeable employees, partner employees and/or volunteers must staff the resource area to assist with job seeker questions.

**Workshops:** Career Centers and their partners must provide a wide range of informational workshops to job seekers as part of their career services offerings. These workshops focus on job search and soft skills, such as interviewing techniques, resume preparation, networking, effective communications skills, conflict resolution, computer literacy and job readiness training. Career Centers must post and follow a monthly schedule for all workshops. Workshops should be offered as a hybrid mix of on-line and in-person sessions.

### 2. Eligibility Determination and Registration

The eligibility determination process is considered a basic career service, but is explained in detail in this section, as it is a critical function of a Comprehensive Center for Title I of WIOA. Career Centers are required to develop and implement a WIOA eligibility process that is timely and meets state and local policy requirements without unnecessary delays in providing access to career services. Included in this process, the Career Centers must determine WIOA eligibility and collect information to support
the determination of eligibility.

To be an eligible adult participant, an individual must be 18 years of age or older and provide documentation of Social Security number, compliance with Selective Services requirements, and compliance with authorization to work within the United States requirements. To be an eligible dislocated worker participant, an individual must:

a. be a Boston resident who has been terminated or laid off, or have received a notice of termination or layoff
b. be a non-resident who has been terminated or laid off, or received a notice of termination or layoff, from a Boston employer
c. have been self-employed, but be unemployed because of general economic conditions; or
d. be a displaced homemaker.

Boston gives priority of service to several populations including adult recipients of public assistance, other low-income individuals, individuals who are basic skills deficient, the disabled, and veterans.

Suitability for both adult and dislocated worker services is determined by an assessment of the individual’s skill level, education, aptitudes, abilities, work and wage history, supportive service needs, as well as his or her interests, goals, and aspirations. If a job seeker is deemed inappropriate for WIOA services, he or she will be referred to the appropriate educational entity or social service agency for assistance.

3. **Individualized Career Services**

Under WIOA, individualized career services must be made available if determined to be appropriate, for an individual to obtain or retain employment. Individualized career services are more comprehensive, in-depth, and individualized than basic career services, and involve interaction with a career coach or an equivalent.

These services include the following:

a. Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include:
   i. Diagnostic testing and use of other assessment tools; and
   ii. In-depth interviewing and evaluation to identify employment barriers and appropriate employment goals.

Career Centers must complete objective, comprehensive and specialized assessments of the job seeker. These assessments involve a more thorough examination than the initial assessment and are conducted or coordinated by a career coach or equivalent. The role of the career coach is to ensure access to the full array of services and activities required and available under WIOA, and to provide professional support to job seekers as they decide on employment and education plans and seek to improve their skills.

b. Development of an IEP, to identify the employment goals, appropriate achievement
objectives and the appropriate combination of services for the participant to achieve his or her employment goals. One key role of the career coach is working with the job seeker to develop the IEP. The IEP should be considered an agreement between the career coach and the job seeker of the plan of action they will take together to overcome any barriers to employment and secure employment leading to self-sufficiency. The IEP should include short- and long-term goals and the steps and supports necessary to achieve those goals. Ideally, the IEP will focus on a career pathway that can provide a guide beyond initial employment and must be updated regularly as a job seeker progresses.

c. All WIOA services provided to a job seeker must be identified and the need justified in the IEP. A hard copy case file must be maintained on each participant containing eligibility documents and pertinent case file information not recorded in the electronic case file. Career coaches must also provide job seekers with a signed copy of the IEP. The IEP is a living plan that should be updated as goals and milestones are met and routinely discussed with job seekers. In cases where needs and services change, the IEP must be updated.

d. Provision and coordination of supportive services: Supportive services address those life issues impacting a job seeker’s ability to get or retain adequate employment. Depending on funding availability, The Partnership may award funds to assist with basic supportive services such as transportation, work equipment and uniforms, and childcare services. In cases where job seekers must be referred, all referrals of WIOA job seekers should be tracked to ensure that the job seeker is receiving the service. If the service cannot be provided per that referral, it is the expectation that alternate plans for securing that service will be initiated.

e. Group counseling

f. Individual counseling

g. Career planning

h. Short term pre-vocational services including the development of learning skills, communications skills, interview skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training

l. Workforce preparation activities

m. Financial literacy services (such as financial aid applications, income tax credits and counseling)

n. English language acquisition and integrated education and training programs.

4. Training Services: (included in individualized career services)

WIOA clarifies that there is no sequence of service requirement to receive training. Training may be made available to individuals if after an interview, assessment or evaluation and career planning, it is determined that the individual:
• Is unlikely or unable to obtain or retain employment that leads to self-sufficiency or comparable wages to or higher than wages from previous employment
• Needs training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher wages from previous employment through career services alone; and
• Has the skills and qualifications to successfully participate in the selected program of training services.

The following items explain the different training options available to participants. The selection of training services should be conducted in a manner that maximizes job seeker choice and is linked to in-demand occupations. Career advisors must ensure that job seekers explore other funding options and research performance of relevant training providers.

a. **Individual Training Accounts (ITAs):** ITAs are tuition vouchers that may be redeemed at any one of many eligible training providers. The Career Center does not provide training services directly, but, rather, facilitates the ITA application and selection process with the job seeker. The training is conducted by an approved training provider listed on the Boston certified training provider list. Career advisors are expected to assist job seekers with researching and selecting training programs that align with the job seeker’s IEP.

b. **Pre-Apprentice Training:** Pre-apprenticeship programs provide training to increase math, literacy, and other vocational skills needed to enter a registered apprenticeship program. A pre-apprenticeship program funded with an ITA must have at least one registered partner; such pre-apprenticeship programs must possess or develop a strong record of enrolling its graduates into a registered apprenticeship program.

c. **On-the-Job Training (OJT):** OJT services typically involve “hands on” training in occupational skills for a specific occupation. Private, nonprofit, or public sector employers provide training for an individual who needs additional skill training for a specific job. The participant is an employee of the company and to offset the cost of the training, the employer can be reimbursed up to 50% of wages, based on criteria provided by The Partnership, during the training period. Career Centers may be required to develop OJT agreements with employers and should have staff knowledgeable of the OJT forms and procedures.

5. **Career Pathways**

WIOA places a strong emphasis on career pathways. Career Centers should apply a career pathway approach throughout their service delivery. Career pathways are defined as, a combination of rigorous and high-quality education, training, and other services that:

• Align with the skill needs of industries in the state or regionaleconomy
• Prepare an individual to be successful in any of a full range of secondaryor postsecondary education options
- Include counseling to support an individual in achieving the individual’s education and career goals
- Include, as appropriate, education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster
- Organize education, training, and other services to meet particular needs of an individual in a manner that accelerates the educational and career advancement of the individual to the extent practicable
- Enable an individual to attain a secondary school diploma or its recognized equivalent, and at least one recognized postsecondary credential; and
- Help an individual enter or advance within a specific occupation or occupational cluster.

6. Follow-up Services:

Career Centers must communicate with, and monitor the progress of, job seekers throughout enrollment in the program. In addition, follow-up activities must be provided as appropriate, to individuals who have exited from the program for up to one year. Follow-up services tend to be of two major types: retention and advancement services for employed individuals; and reemployment services for job seekers who lose their jobs.

7. Service to individuals: universal access, WIOA-eligible, and fee-based

In compliance with Mass Workforce Issuance 100 DCS 18.101 (July 1, 2015), Career Centers are required to offer universal access – providing all job seekers with intake, orientation to the Career Center system, determination of eligibility, and access to the Career Center resource area. Career Centers must make a higher level of service available to WIOA-eligible job seekers, including initial skills assessment, job search and placement assistance, program referrals, labor market information, and assistance on filing unemployment insurance claims.

If the Career Center staff determines that additional support is needed for an individual to obtain or retain employment, WIOA-eligible job seekers must receive a more comprehensive skills assessment and assistance with developing an IEP – as well as, as appropriate, group and/or individual counseling, career planning assistance, workforce preparation activities, and training services paid for by individual training accounts.

Career Centers may offer more intensive individualized and group services on a fee-for-service basis to job seekers who are not WIOA-eligible. However, low-income individuals and dislocated workers who are WIOA-eligible may not be charged for the services listed above. The PIC must approve in the list of fee-based services offered and the rates charged. Revenue from fee-based services must be reinvested in Career Center services. (See WIOA Communication 01-45 or subsequent WIOA communication when issued.)
A 4: Definitions of Key Terms

**Basic Skills Deficient** – The individual computes or solves problems, reads, writes, or speaks English at or below the eighth-grade level or is unable to compute or solve problems, read, write, or speak English at a level necessary to function on the job, in the individual’s family, or in society. In addition, states and grantees have the option of establishing their own definition, which must include the above language. In cases where states or grantees establish such a definition, that definition will be used for basic skills determination.

**Certificate** – A certificate is awarded in recognition of an individual’s attainment of measurable technical or occupational skills necessary to gain employment or advance within an occupation. These technical or occupational skills are based on standards developed or endorsed by employers. Certificates awarded by workforce investment boards are not included in this definition. Work readiness certificates are also not included in this definition. A certificate is awarded in recognition of an individual’s attainment of technical or occupational skills by:

- A state educational agency or a state agency responsible for administering vocational and technical education within a state.
- An institution of higher education described in Section 102 of the Higher Education Act (20 USC 1002) that is qualified to participate in the student financial assistance programs authorized by Title IV of that Act. This includes community colleges, proprietary schools, and all other institutions of higher education that are eligible to participate in federal student financial aid programs.
- A professional, industry, or employer organization (e.g., National Institute for Automotive Service Excellence certification, National Institute for Metalworking Skills, Inc., Machining Level I credential) or a product manufacturer or developer (e.g., Microsoft Certified Database Administrator, Certified Novell Engineer, Sun Certified Java Programmer) using a valid and reliable assessment of an individual’s knowledge, skills, and abilities.
- A registered apprenticeship program.
- A public regulatory agency, upon an individual’s fulfillment of educational, work experience, or skill requirements that are legally necessary for an individual to use an occupational or professional title or to practice an occupation or profession (e.g., FAA aviation mechanic certification, state certified asbestos inspector).
- A program that has been approved by the Department of Veterans Affairs to offer education benefits to veterans and other eligible persons.
- Job Corps centers that issue certificates.
- Institutions of higher education which is formally controlled, or has been formally sanctioned, or chartered, by the governing body of an Indian tribe or tribes.

**Credential** - A nationally recognized degree or certificate or state/locally recognized credential. Credentials include, but are not limited to, a high school diploma, GED, or other recognized equivalents, post-secondary degrees/certificates, recognized skill standards, and licensure or industry-recognized certificates. States should include all state education agency recognized credentials.
**Date of Exit** – Represents the last day on which the individual received a service funded by the program or a partner program (see definition of “exit”).

**Diploma** – The term diploma means any credential that the state education agency accepts as equivalent to a high school diploma. The term diploma also includes post-secondary degrees including Associate (AA and AS) and bachelor’s degrees (BA and BS).

**Employed in the Quarter After the Exit Quarter** – The individual is considered employed in a quarter after the exit quarter if wage records for that quarter show earnings greater than zero.

**Employed in the Second or Third Quarter After the Exit Quarter** - The individual is considered employed if wage records for the second or third quarter after exit show earnings greater than zero. Wage records will be the primary data source for tracking employment in the quarter after exit.

**Exit** - The term “program exit” means a participant does not receive a service funded by the program or funded by a partner program for 90 consecutive calendar days and is not scheduled for future services.

**Participant** – A participant is an individual who is determined eligible to participate in the program and receives a service funded by the program in either a physical location (Comprehensive Career Center or affiliate site) or remotely through electronic technologies.

**Qualified Apprenticeship** - A program approved and recorded by the ETA Bureau of Apprenticeship and Training or by a recognized state apprenticeship agency or council. Approval is by certified registration or another appropriate written credential.

**Training Services** - These services include WIOA-funded and non-WIOA funded partner training services. These services include: occupational skills training, including training for nontraditional employment; on-the-job training; programs that combine workplace training with related instruction; training programs operated by the private sector; skill upgrading and retraining; job readiness training; adult education and literacy activities in combination with other training; and customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

**Work Readiness Skills Goal** - A measurable increase in work readiness skills including world-of-work awareness, labor market knowledge, occupational information, values clarification and personal understanding, career planning and decision making, and job search techniques (resumes, interviews, applications, and follow-up letters). They also include positive work habits, attitudes, and behaviors such as punctuality, regular attendance, presenting a neat appearance, getting along and working well with others, exhibiting good conduct, following instructions and completing tasks, accepting constructive criticism from supervisors and co-workers, showing initiative and reliability, and assuming the responsibilities involved in maintaining a job. This category also entails developing motivation and adaptability, obtaining effective coping and problem-solving skills, and acquiring an improved self-image.
Section VI: Required Forms

F1: Cover Page

F2: Proposal Checklist

F3: Baseline System Requirements

F4: Statement of Compliance Form

F5: Budget Forms
F1: Cover Page

Agency Name: |

Mailing Address: |

Contact Person: |

Phone: |

Title: |

Email: |

Taxpayer Identification No: (Federal Identification Number)

Applying as:  
- Single organization with no contracted services
- Single organization with contracted services

List of Contracted Service Partner Organizations

<table>
<thead>
<tr>
<th>Organization:</th>
<th>Contact Person:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>Services Provided:</td>
</tr>
</tbody>
</table>

To the best of my knowledge and belief, all information in this application is true and correct, the document has been duly authorized by the governing body of the applicant, and the applicant will comply with the attached assurances if the grant is awarded.

Typed Name of Authorized Representative: |

Signature: |

Date: |

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F2: Proposal Checklist of Materials to Be Submitted

Career Center Operator Proposal Submission Components:

- Entire submission by email
- Signed Proposal Cover Sheet (Attachment F1) and Table of Contents (for all parts of proposal, including attachments listed below)
- No more than 2-page Executive Summary
- Proposal Narrative
- Budget Form and Narrative Information (Attachment F5)

Attachments

- Memorandum of Agreement (if bidder is a collaborative)
- Organizational chart
- Customer flow chart for Job seekers (optional)
- Certificate of Good Standing that all tax liabilities have been met
- Signed Baseline Requirements (Attachment F3)
- Signed Compliance certifications (Attachment F4)

REMINDER: (Proposal Narratives are limited to 25, single-sided, 8.5” x 11” pages, using a typeface of no smaller than 12 point - not including cover sheet, table of contents, executive summary budgets, and other attachments.)

All of the above information is required. Failure to provide this information will render the proposal non-responsive and will therefore not be reviewed.
F3: Baseline System Requirements

Successful applicants to this RFP must demonstrate a commitment to several program elements deemed by the MassHire Boston Workforce Board/Boston Private Industry Council to be required design and operation components of the One Stop Career Center System and Adult & Dislocated Worker programs.

Please indicate your commitment below to implementing these elements into your program design and operations.

• Agree to closely partner with the PIC and its staff in a productive relationship in the spirit of continual improvement and system collaboration. This includes director attendance at regular local and state meetings and providing staff of the appropriate level and function to serve on stakeholder bodies and staff events as periodically requested by the PIC and OWD. The PIC and OWD will ensure that such requests are equitably distributed among the career centers.

• Agree to strive to achieve Common Measures as negotiated by the MA Department of Career Services and track progress monthly. Agree to achieve local performance benchmarks set by the PIC and OWD.

• Agree that businesses are key customers to the One Stop Career Center system and will align resources and time to the implementation of business services in coordination with the PIC and OWD.

• Agree to collaborate with the MA Department of Career Services, the PIC, and OWD on system changes and training opportunities.

• Agree to maintain a visible and proactive online presence through an updated website and appropriate social media.

• Agree to collaborate and connect with other PIC and OWD Initiatives including but not limited to Boston Healthcare Careers Consortium, STEM Initiative, Adult Literacy Initiative, and other policy development efforts.

As representative of the lead organization ____________________________, I agree to the above commitments to the system.

Signature: ____________________________ Date: ____________________________

Title: ____________________________
F4: Statement of Compliance Form

As the authorized signatory official for ______________________ (submitting lead organization) I hereby certify:

- That the above-named applicant is legally authorized to submit this proposal requesting funding under the Workforce Innovation and Opportunity Act

- That the above-named applicant does hereby agree to execute all work related to this application in accordance with the Workforce Innovation and Opportunity Act, US Department of Labor, Commonwealth of Massachusetts Department of Career Services Issuances, Boston Workforce Development Board policies and guidelines, and other administrative requirements issued by the Commonwealth of Massachusetts. The vendor shall notify the Boston WDB within 30 calendar days after issuances of any amended directives if it cannot comply with the amendments and

- That the above-named applicant will ensure special efforts to prevent fraud and other program abuses, such as but not limited to, deceitful practices, intentional misconduct, willful misrepresentation, and improper conduct which may or may not be fraudulent in nature; and

- That the contents of the application are truthful and accurate and the above-named applicant agrees to comply with the policies stated in this application and that this application represents a firm request subject only to mutually agreeable negotiations; and the above-named applicant is in agreement that the Boston WIB reserves the right to accept or reject any proposal for funding; and that the above-named applicant has not been debarred or suspended from receiving federal grants, contracts, or assistance; and that the above-named applicant waives any right to claims against the members and staff of the Boston Workforce Development Board.

Authorized Representative Signature: ________________________________

Name: ________________________________  Title: ________________________________

Date: ________________________________
F5: Budget forms