

**BOSTON PRIVATE INDUSTRY COUNCIL**

**BOSTON'S WORKFORCE DEVELOPMENT BOARD**

in partnership with

**THE MAYOR'S OFFICE OF WORKFORCE DEVELOPMENT**

# REQUEST FOR PROPOSALS

---

Comprehensive One-Stop Career Center Operator

October 3, 2016

Proposals must be received no later than 4:00 p.m. on  
Friday, December 9, 2016.



## Request for Proposals: Comprehensive One-Stop Career Center Operator

Issued: October 3, 2016  
Bidders Conference: October 14, 2016 at 10:00 a.m.  
Proposals Due: December 9, 2016  
Questions: CareercenterQ@Bostonpic.org

Contact: Angela McCabe  
617-488-1355  
[angela.mccabe@bostonpic.org](mailto:angela.mccabe@bostonpic.org)

# Table of Contents

---

- Section I: General Information ..... 3**
  - A. Workforce Innovation and Opportunity Act ..... 4**
  - B. Purpose of RFP and Contract Period ..... 5**
  - C. RFP Schedule ..... 6**
  - D. Eligible Bidders ..... 6**
  - E. Funding Availability ..... 7**
  - F. Integrity Firewalls ..... 8**
  - G. Right to Cancel..... 8**
  
- Section II: Background..... 9**
  - A. Overview of Boston Labor Market Trends ..... 9**
  - B. Vision and Priorities..... 10**
  - C. Service Model..... 13**
  - D. Role of the Comprehensive One-Stop Center..... 14**
  - E. Role of the PIC ..... 15**
  - F. Role of the OWD..... 16**
  - G. Performance, Data, Reporting, and Evaluation ..... 16**
  - H. Chartering and Financial Contracting Information ..... 17**
  - I. Incorporation of RFP into Contract ..... 19**
  - J. Subcontracting ..... 19**

**Section III: Solicitation Process and Terms ..... 20**

- A. Period of Solicitation ..... 20**
- B. Bidders Conference..... 20**
- C. RFP Inquiries, Questions, Answers, and Ex Parte Communications..... 20**
- D. Proposal Review and Evaluation Process ..... 20**
- E. Proposal Components..... 21**

**Section IV: RFP Response Instructions – Comprehensive One-Stop Center ..... 22**

- A. General Preparation Instructions ..... 22**
- B. Submission Format ..... 23**
- C. Criteria ..... 23**
- D. Executive Summary ..... 24**
- E. Program Narrative ..... 24**
- F. General Procurement Statements and Limitations ..... 31**
- G. Right to File a Grievance ..... 33**

**Section V: Attachments..... 37**

**Section VI: Required Forms ..... 48**

## Section I: General Information

---

The Boston Private Industry Council, which serves as the Boston Workforce Development Board (hereinafter referred to as Boston PIC or PIC), 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 One-Stop Center or Centers 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 (WIOA) required services and related partner services.

Applicants are expected to describe how they will make customer-friendly employment services available to the general public, both job seekers and employers, as well as 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 Department of Elementary and Secondary Education.

Proposals should include a business strategy that aligns with regional workforce development priorities, responds to the needs of local employers, and aligns with the skills and career aspirations of the job seekers it expects to serve. Business strategies should complement and incorporate the Commonwealth's *Demand 2.0* initiative.

A Comprehensive One-Stop Center (also referred to as an "American Job Center") may choose to operate at a single site, or it may elect to add one or more One-Stop Center Affiliate sites. The operator of a Comprehensive Center may enter into an agreement with a partner organization to staff an Affiliate or satellite site. However, the Comprehensive Center operator must deploy at least one employment service staff member and integrate the operation of the Affiliate site within its own system. Core funding for a Comprehensive Center for FY 2018 is expected to range between \$800,000 and \$1.5 million.

Later this year, the PIC and OWD plan to issue a second RFP for career center Access Points in order to provide additional sites where customers can enroll in the system and learn about the services available at the Comprehensive One-Stop Centers and through partner agencies. These Access Points will be operated by entities other than the Comprehensive Center operators, and they will receive limited funding, between \$50,000 and \$100,00, for staff support and technology to complement existing services.

## **A. Workforce Innovation and Opportunity Act**

In July 2014, WIOA was signed into law. WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. Congress passed WIOA by a wide bipartisan majority and it is the first legislative reform in 15 years of the public workforce system. WIOA supersedes the Workforce Investment Act of 1998 (WIA) and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973. Boston is one of sixteen (16) Local Workforce Development Areas (as defined in WIOA Section 107, the Boston Local Workforce Development Area is referred to herein as the “LWDA”) designated by the Governor in the state of Massachusetts. The Mayor of Boston serves as the Chief Elected Official (CEO) and has appointed the Boston PIC to function as the Local Workforce Development Board (WDB) for the LWDA. Incorporated as a 501(c)(3), the Boston PIC’s mission is to strengthen Boston’s communities and its workforce by connecting youth and adults with education and employment opportunities that align with the needs of area employers. The Boston PIC provides staffing to the WDB and, pursuant to WIOA, has been authorized by the Massachusetts Department of Career Services to conduct and manage the procurement of One-Stop Center (as defined in WIOA Section 3) services for the LWDA.

The Boston PIC serves as Boston’s Workforce Development Board in partnership with the OWD. OWD serves as the WIOA administrator and fiscal agent for both federal and state One-Stop Center funds. The PIC and OWD have partnered since the inception of WIA in 1998 and continue to work together today. Although organization roles are separated for policy (PIC) and administrative (OWD) purposes, in practice the staff of both organizations collaborate fully in the development of the vision, policies, and procedures that shape the workforce development system-building efforts and guide the function and operations of the One-Stop Center (to be designated as an “American Job Center” in accordance with WIOA Section 121(e)(4) and the regulations adopted thereunder) system in Boston.

The purpose of the WIOA programs is to provide allowable workforce development activities to eligible individuals that aim to increase employment retention and earnings of participants, and increase occupational skill level attainment by participants. WIOA defines the required activities authorized for One-Stop Operators (as defined in WIOA Section 3). Bidders are encouraged to familiarize themselves with WIOA to understand the scope of authorized activities.

Bidders are encouraged to read WIOA to understand the scope of authorized activities. In general, these activities are to:

1. establish a One-Stop Center system;
2. provide career services to adults and dislocated workers, respectively, through the One-Stop Center system;
3. provide training services to adults and dislocated workers through the distribution of training vouchers;

4. establish and develop relationships and networks with large and small employers and their intermediaries; and
5. work in close partnership with other providers to create an integrated workforce development system.

The One-Stop Center delivery system is a cornerstone of the reforms contained in Title I of WIOA. It is designed to enhance access to services and improve long-term employment outcomes for individuals seeking assistance. The regulations define the system as consisting of one or more comprehensive, physical American Job Center(s) in a local area that provide the core services specified in WIOA. The One-Stop Centers are required to be points of entry for the following programs for individuals with multiple needs:

1. Title I: Adult, dislocated worker, and youth programs
2. Title II adult education and literacy programs
3. Title III Wagner-Peyser program
4. Title IV vocational rehabilitation program
5. Temporary Assistance for Needy Families (TANF);
6. Senior Community Service Employment Program (SCSEP);
7. Trade Adjustment Assistance Programs (TAA);
8. Unemployment Compensation Programs; and
9. Disabled Veterans' Outreach Program (DVOP).

Additional information and a copy of the WIOA regulations is available at <HTTPS://www.doleta.gov/WIOA/>

## **B. Purpose of RFP and Contract Period**

The purpose of this RFP is to solicit proposals from qualified entities to serve as a WIOA One-Stop Operator for the Boston LWDA. The proposal or proposals that, in the opinion of the awarding body, best provide for operating a Comprehensive One-Stop Center system to serve the Boston LWDA will be invited to enter into contract negotiations. Resulting contracts will be negotiated with respect to cost, scope, and content in a manner that establishes of a system in the best interest of Boston job seekers and employers. 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 period of performance will be July 1, 2017 through June 30, 2018. Any contracts entered into as a result of this RFP may be extended for three (3) additional one-year periods, if agreeable to both parties.

### C. RFP Schedule

RFP Released	October 3, 2016
Applicant Orientation I	October 14, 2016
Applicants' questions submitted to the PIC in writing	On an ongoing basis through November 4, 2016
Proposals due	December 9, 2016
Site visits and interviews	January 9 - 20, 2017
WDB votes to approve charters and public announcement of results	February 2017
Appeal process	February 2017 to March 31, 2017
Contract development	March – April 2017
Contract Start	July 1, 2017

### D. 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 One-Stop 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 on behalf of the local office of the agency;
3. a community-based organization, nonprofit organization, or intermediary;
4. a private-for-profit entity
5. a government agency; and
6. another interested organization or entity, which may include a local chamber of commerce or other business organization, or a labor organization."<sup>1</sup>

*EXCEPTION: Elementary schools and secondary schools shall not be eligible for designation or certification as One-Stop Operators, except that nontraditional public secondary schools and area career and technical education schools may be eligible for such designation or certification.*

---

<sup>1</sup> WIOA Section 121(d)(2)(B) available at: <https://www.gpo.gov/fdsys/pkg/PLAW-113publ128/pdf/PLAW-113publ128.pdf>.



The agreement between the Boston PIC and the One-Stop Operator shall specify the operator's role. That role may include coordinating service providers within the One-Stop 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.

### E. Funding Availability

Only to assist entities with budget development in response to this RFP, core funding amounts (W-P, State line item, and WIOA (service dollars not including training funds) for the One-Stop Centers over the last 2 years are indicated below. In FY 2017, Boston received an additional \$381,527 to operate the “Re-Employment Services Eligibility Assessment” (RESEA) program and \$53,000 to provide case management to Trade customer. 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. All amounts are estimates for planning purposes and subject to change.

	<b>FY 2015</b>	<b>FY 2016</b>	<b>FY 2017</b>
WIOA (1A &1D)	\$810,546	\$939,621	\$763,200
MA One Stop line Item	\$695,545	\$526,869	465,443*
Wagner-Peyser	\$962,613	\$1,029,417	\$1,061,791
<b>System Total</b>	<b>\$2,468,704</b>	<b>\$2,495,907</b>	<b>\$2,290,434</b>

*\* State line item allocations are still in negotiation at time of RFP release*

Federal funding is the primary sub-grant support for the One-Stop Center system. For planning purposes, respondents to this RFP should assume no more than level funding for each program year. FY2017/FY2018 amounts are subject to change, based upon the actual amount secured by OWD and funds may fluctuate from year-to-year. The contract agreement shall be modified to increase or decrease funding as needed to reflect actual federal funds received during the contract period. One or more successful bidders will be awarded a cost-reimbursement contract pursuant to this RFP. The WDB may expand the scope of the contract to include other workforce programs, funding or requirements that the WDB deems necessary and appropriate. All agreements are subject to the availability of funds for the Boston LWDA.

## **F. 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 and in reality, whenever an organization that operates education, training, and/or fee-based placement services, also operates a One-Stop 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 One-Stop Centers. One-Stop Centers may refer individuals to organizations participating in the operation of One-Stop 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.

## **G. 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 US 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: Background

---

### A. Overview of Boston Labor Market Trends

The One-Stop Center system established in 1997 faced different labor market needs than the current system. Now, the unemployment rate is down, but Boston continues to experience persistent long-term unemployment. Our workforce is more educated, but skill gaps disrupt the labor supply. Labor market conditions in the city of Boston continue to improve with very strong job growth over the past few years.

- The city's unemployment rate in 2015 was 4.6%, down 3% from 7.6% in 2010. On an average month during 2015, there were 358,600 residents in the city's labor force, with 342,200 employed and nearly 16,400 unemployed. The city's labor force grew by 19,948 members or 5.8% between 2010 and 2015.
- The city has added nearly 57,000 jobs between 2010 and the first nine months of 2015, an increase of 10.4%. The following industries in Boston have led the way in terms of absolute and relative growth:
  - Professional and Technical Services: +18,344 (32.3%)
  - Construction: +2,454 (25.7%)
  - Accommodation and Food Services +9,292 (19.5%)
  - Health Care and Social Assistance +16,154 (13.6%)
  - Retail Trade: +3,410 (12.8%)
  - Educational Services +5,406 (11.4%)

However, the labor market gains in recent years have not been distributed equally across the city of Boston. In March 2016, OWD partnered with the Boston Redevelopment Authority's (BRA) Research Division to release the report, "*Boston's Workforce: An Assessment of Labor Market Outcomes and Opportunities*."<sup>2</sup> The report analyzes the Boston labor market in the context of income inequality and resident labor force participation trends over time. Key findings include:

- Between 2009 and 2013, unemployment rates for Black and Hispanic/Latino workers in Boston were 1.72 and 1.38 times the city average, respectively.
- Unemployment rates also vary widely across neighborhoods of the city.
- A quarter of the city's fully employed workers earned less than \$35,000 in 2014.
- By 2022, 41% of Boston jobs are expected to require a bachelor's degree (compared to 27% nationally), and 36% will be available to those with a high school degree or less (compared to 50% nationally).

---

<sup>2</sup> Available at: [http://owd.boston.gov/wp-content/uploads/2016/03/2015-Office-of-Workforce-Development-Workforce-Report-Booklet\\_v1\\_r8\\_spreads.pdf](http://owd.boston.gov/wp-content/uploads/2016/03/2015-Office-of-Workforce-Development-Workforce-Report-Booklet_v1_r8_spreads.pdf).

## **B. Vision and Priorities**

Given the new requirements specified under WIOA and the uncertainty in funding for workforce development training and services and in particular the state budget One-Stop line item, the Boston PIC and the OWD are compelled to rethink the structure and role of the One-Stop Centers within the context of overall investments for workforce services. As envisioned by WIOA, employer needs drive strategies and job seekers most in need of support to advance should be prioritized. Our goal is to provide connections between employers and skilled workers and to provide all residents throughout Boston with access to high quality One-Stop Centers that connect residents with the full range of services available in their communities, whether they are looking to find jobs, build basic educational or occupational skills, earn a postsecondary certificate or degree, or obtain guidance on how to make career choices.

To accomplish this, the PIC and OWD are looking to more efficiently and effectively align the training, education, and labor exchange resources in the City of Boston. OWD has established the following priorities to meet the needs of the most vulnerable residents:

1. The use of career pathways models that provide clear sequences and connections between education and training programs and jobs with defined career ladders that allow participants to progress from one level to the next to improve their career prospects.
2. The use of partnerships and collaborations to ensure there are no gaps in the continuum of quality education, training, workforce development and supportive services to address a wide range of barriers for various populations, with a goal of helping individuals obtain and retain jobs and achieve economic security.
3. A high degree of coordination and accessibility of wrap-around support services which address a wide range of individual and family needs.
4. Integration of work readiness for those with the lowest levels of literacy and skills that recognize pursuing work is an interest and motivation throughout literacy levels.

To meet the needs of the dominant sectors, the PIC has prioritized developing pipeline strategies in healthcare, life sciences, information technology, and hospitality. While the PIC has customized strategies to the needs of each sector, in general, we use labor market intelligence to guide training investments, provide career education and navigation, and supportive services to ensure successful transitions from preparation to employment and productivity.

One-Stop Centers will play a critical role as broker and connector to implement this vision of an integrated workforce development system. They will capture labor market intelligence based on the experiences of job seekers that can be used to share with others in the business of preparing individuals for employment. Through collaboration with city, state, and federal agencies, as well as nonprofit partners, One-Stop Centers will be able to draw talent from a range of preparation pathways to present to employers. The WIOA local memorandum of understanding (Appendix 1) has formalized this network to integrate State agency partners within the One-Stop Center. More so than in prior iterations, WIOA requires One-Stop Centers to work through and with partners to

achieve community goals.

A successful bidder will serve all persons requesting assistance, including recipients of public assistance, other low-income individuals, veterans, and individuals who are basic skills-deficient. A successful bidder will create, collect, and maintain all records relating to One-Stop Center operations and WIOA service provision activities that are required to be made by applicable federal or state laws or regulations, made relevant by guidance from the U.S. Department of Labor, and/or which are necessary for determining the LWDA's attainment of the local levels of performance negotiated with the Governor of Massachusetts and the Mayor of Boston. The LWDA's local annual WIOA plan describes local levels of performance, and a successful bidder will be required to provide support for WIOA service providers, and co-located and non-co-located partners to meet or exceed their goals.

We are seeking applicants who share this vision of providing high-quality career services in Boston. We group our priorities into three functional areas: (1) commitment to excellent customer service, (2) innovation and effective service design, and (3) the ability to operate with integrated management systems and high quality staffing. We provide detailed information about each priority below.

1. Excellent customer service to job seekers, workers and businesses and the partnerships that support them
  - a. Customer-friendly employment services, available to job seekers and employers.
  - b. Effective intake process for determining WIOA eligibility and triage for leveraging additional system supports.
  - c. A strategy to provide higher intensity career services for WIOA-eligible job seekers – dislocated workers and low income adults – through collaborative partnerships with entities that also share a mission to serve those with significant barriers to employment: public assistance recipients (Department of Transitional Assistance (DTA), Housing and Urban Development, Supplemental Security Income), individuals with basic skills deficiency (Adult Basic Education (ABE), English Language Learners (ELL), Community College), and veterans.
  - d. Ability to integrate customer services with the services provided by federally funded state agencies (vocational rehabilitation, DTA, ABE), including co-located delivery.
  - e. An assessment process to identify the education/training, employment, social/emotional, financial, and skill needs of job seekers in order to focus on matching service delivery to intensity of need along a career pathway.
  - f. Focus on career pathways as an effective strategy to help job seekers and workers gain marketable skills and industry-recognized credentials.

- g. Provide universal access through multiple entry points, using a more flexible system for delivery of services that leverages strategic partnerships and technology to enhance capacity.
  - h. Provide information and guidance to make informed decisions about training and careers to compete in current and future labor markets, including the integration and use of available LMI tools (Help Wanted Online, Career Readiness 101, and Transferable Occupational Relationship Quotient- TORQ).
  - i. A business strategy that:
    - i. aligns with longer term regional workforce development priorities,
    - ii. responds well to the specific demands of the employers in the local labor market, and
    - iii. aligns with the immediate and future assets of job seekers.
2. Collaborative framework for innovative and effective service design
- a. Innovative design, programs, and policies to better meet the needs of employers and job seekers, support career pathway development, and address regional workforce challenges.
  - b. Create a culture of innovation that moves service beyond the transactional labor exchange model to provide workforce development services including career planning.
  - c. Strengthen relationships with community college partners to facilitate skill development and career progression.
  - d. Promote WIOA services throughout the local community and ensure accessibility through virtual and center-based services, non-traditional hours of operation, and collaboration with community partners including housing developments, health centers, and social service providers.
  - e. Provide online resources (workshop materials, assessment tools, etc.) to certain One-Stop Center Access Points that will be established subsequent to the RFP process to ensure quality of service throughout the system and reduce duplication of effort.
3. Ability to operate with integrated management systems and high quality staffing
- a. Proven ability to manage data for reporting and analyze data for decision-making, both internally and in collaboration with other agencies/partners.
  - b. Potential to excel on performance measures such as entered employment, job quality (wages and benefits), retention rates, skill gain, and competency development, as well as job seeker and employer satisfaction.

- c. Hire and develop staff with knowledge of specific industry sectors and provide continuous professional development to ensure that staff remain current in industry qualifications, certifications, and expectations.
- d. Develop meaningful partnerships that provide individuals with the range of services available in their local area, whether they are looking for jobs, basic education or occupational skills, post-secondary credential, career navigation, or are businesses seeking skilled workers.

### **C. Service Model**

The operator(s) selected under this RFP will be part of a fully coordinated and integrated workforce development strategy. Boston has a wealth of community based organizations, social service agencies, and education and training providers that offer employment services to a diverse population. We envision a network of career services providers that will mutually support the needs of customers while reducing replication of services in the city. We want providers to develop solid partnerships to maximize the limited resources available. One-Stop Centers need additional services to address the barriers that job seekers experience, including assistance with housing, childcare, transportation, legal and clinical support. The exchange of resources would make the system stronger and reduce duplication.

To foster this vision of an integrated system, the Boston PIC has established three levels of certification for its One-Stop Centers: Comprehensive, Comprehensive with Affiliate site(s), and Access Point. Certification status primarily focuses on the following elements: number of co-located One-Stop Partners, full time equivalencies, availability of services, physical environment of the One-Stop Center. The requirements of each level are as follows.

Applicants are currently being asked to apply to operate a Comprehensive One-Stop Center, with the option of including Affiliate sites. The Boston PIC expects to request proposals for operation of One-Stop Center Access Points in February 2017.

1. Comprehensive One-Stop Center (to be 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 One-Stop Center in-person or electronically. 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 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 (Appendix 1)
2. Affiliate site— A Comprehensive One-Stop Center may elect to also operate one or more One Stop 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. One-Stop 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 will be primarily a connection through the use of technology to the Comprehensive One-Stop Center(s) and other resources. The Access Point will coordinate and collaborate with the Comprehensive One-Stop Center(s).

#### **D. Role of the Comprehensive One-Stop Center**

Comprehensive One-Stop 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 One-Stop Centers are the nexus for businesses, job seekers, occupational skills training providers, and higher education. They actively engage with all of these entities and serve as the brokers of education, training, and labor exchange services.

With job seekers, Comprehensive One-Stop Centers shall:

- Assess qualifications and experience
- Determine eligibility and track job seekers over the course of the grant enrollment period
- 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 (Appendix 1) formalized this network to integrate partners within the Comprehensive One-Stop Center. A Comprehensive One-Stop 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 One-Stop 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 One-Stop 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 One-Stop Centers to partner with the following programs to provide Meaningful Assistance to job seekers enrolled in partner programs. “Meaningful Assistance” is defined as providing assistance 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:

- One-Stop 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 One-Stop Centers to provide information to individuals about One-Stop Partner programs or services; or
- One-Stop Center staff are connected through technology (such as online portals) to One-Stop Partner programs in order to provide meaningful information or services.

## **E. Role of the PIC**

The PIC, serving as the WDB, is charged with issuing One-Stop Center charters, establishing policies, allocating funding, providing program oversight and technical assistance and supporting capacity building. It ensures that the One-Stop 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 One-Stop 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. The PIC also develops training and capacity-building resources that help the Boston system deliver high quality customer services.

## **F. 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 One-Stop Operators to administer all funds, including but not limited to Wagner-Peyser, WIOA, and Massachusetts One-Stop 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 One-Stop 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.

## **G. Performance, Data, Reporting, and Evaluation**

A Comprehensive One-Stop Operator will be responsible for tracking services and outcomes in the state case management Massachusetts One-Stop Employment System (MOSES), as well as the local data metrics currently under development. Staff of the One-Stop Operator will be required to complete MOSES training within three months of the award announcement. The One-Stop 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 in order 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 Appendix 2.

One-Stop 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. One-Stop Operators are required to comply with all levels of evaluation and monitoring of the One-Stop Centers.

Achievement of measurable performance outcomes is a critical expectation of the One-Stop Operator, who is accountable for the 11 WIOA measures listed below (an employer measure will be determined and added by the FY 2018 year).

<b>Adult</b>	<b>Dislocated Worker</b>
<ul style="list-style-type: none"> <li>• Employment Rate (2nd quarter after exit* from program)</li> <li>• Employment Rate (4th quarter after exit from program)</li> <li>• Median Earnings (2nd quarter after exit from program)</li> <li>• Credential Rate (within 1 year after exit from program)</li> <li>• Measurable Skills Gain (real time measure)</li> </ul>	<ul style="list-style-type: none"> <li>• Employment Rate (2nd quarter after exit from program)</li> <li>• Employment Rate (4th quarter after exit from program)</li> <li>• Median Earnings (2nd quarter after exit) from program</li> <li>• Credential Rate (within 1 year after exit from program)</li> <li>• Measurable Skills Gain (real time measure)</li> </ul>

\* A positive exit is defined as completion of a training program for ITA funded participants, or entered employment after individualized career services.

## **H. 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 One-Stop 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 One-Stop Center. The charter is also the legal authorization that will allow the One-Stop Operator to receive funds, charge fees, enter into 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 One-Stop Center. The charter will be supplemented by financial contracts with OWD that provide the core funding for the operation of a One-Stop Center. At a minimum, the charter shall contain the following:

- Specified duration,
- Quality and performance standards of the One-Stop Center,
- Delineation of services to be provided and the center's responsibilities,
- Statement of vision and values,
- Parties to the charter,
- Location of the One-Stop 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 One-Stop Center does not meet the legal, ethical and operational performance standards set by the Boston PIC. The Boston PIC will review the One-Stop 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 One-Stop Operator(s)**

Financial contracts will be entered into on a cost-reimbursement basis. One-Stop 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, 2017 through June 30, 2018. Any financial contracts entered into 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 One-Stop 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 One-Stop 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 Appendix 3.

### **I. 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.

### **J. Subcontracting**

OWD and the Boston PIC encourage the formation of viable partnerships that will help to enhance outreach and recruitment efforts to benefit the LWDA and/or provide strategies to engage employers, organized labor, and/or education in the One-Stop 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 III: Solicitation Process and Terms

---

### A. Period of Solicitation

The deadline to submit a response to the RFP is December 9, 2016 not later than 4:00 p.m. ET. See the timeline on page 5 for more information.

### B. Bidders Conference

A pre-bid conference will be held on October 14, 2016, beginning at 10:00 a.m. ET at the downtown PIC office – 2 Oliver Street. Please email [Angela.McCabe@BostonPIC.org](mailto:Angela.McCabe@BostonPIC.org) to register. Questions posed at the bidders' conference will be answered to the extent possible and allowable at that time. Any questions not answered may be submitted via email to [careercenterQs@bostonpic.org](mailto:careercenterQs@bostonpic.org).

### C. RFP Inquiries, Questions, Answers, and Ex Parte Communications

The primary mode of communication between the PIC and potential applicants will occur through the website. Beginning October 3, 2016, the RFP will be available on:

the PIC website at <http://bostonpic.org/resources/career-center-rfp-2016>

the OWD site at <http://owd.boston.gov/partner-opportunities/>

Applicants are encouraged to submit questions by email to [careercenterQ@bostonpic.org](mailto:careercenterQ@bostonpic.org). Responses to applicants' questions will be available on the PIC website and updated through November 4, 2016. 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 November 4, 2016 will not be answered.

### D. Proposal Review and Evaluation Process

**Phase I:** Proposals will be reviewed and ranked by a review team of PIC and OWD staff, members of the WDB and its committees, and other identified community members who have no fiduciary interest in bidding for any of the WIOA programs and who have expertise in workforce development and/or service delivery.

Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to requirements, completeness and clarity of content. If the bidder's proposal is presented in such a fashion that makes evaluation difficult or overly time consuming, it is likely that points will be lost in the evaluation process. Elaborate and lengthy proposals are neither necessary nor desired.

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. Current operators of OSCC's will be evaluated on outcome data from FY 2016 and the first half of FY 2017 (7/1/16 -12/31/16). Applicants who do not currently operate a One Stop Career Center will be evaluated on program data from the same period and their ability to show capacity to expand services

to One-Stop customers.

**Site visit interviews:** Following the proposal review, panels will conduct site visits to provide each applicant an opportunity to highlight its plans for the delivery of services and the financial requirements outlined in the RFP. During the site visit, each applicant will be given two hours to present its proposal for the delivery of services and the financial requirements. Each applicant may present only information that clarifies the content of the written proposal. New information cannot be presented during the interviews. The individual designated as the authorized negotiator for the applicant, the individual who will serve as the One-Stop director if the applicant is selected, and other key personnel must be in attendance at the interview. Each applicant is limited to a panel of five individuals who will attend the site visit. Written requests to have additional individuals present will be considered.

**Phase II:** The recommendations of the review team will be presented to the Workforce Development Committee in January 2017 and to the Executive Committee of the WDB in February 2017 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.

## E. Proposal Components

The review team will evaluate each submitted proposal based on the following:

Item	Maximum # of Points
Proposal Cover Page	--
Table of Content	--
Executive Summary	20
<i>Proposal Narrative Section</i>	
Organizational Structure and Capacity	40
Staffing Plan	45
Location and Accessibility	20
Program Description:	
Job Seeker Services	60
Employer Services	40
Priority of Service	45
Relationship with Partners	45
Technology, Data Management, and Innovation	40
Budget Narrative	20
<i>Required Forms</i>	
Budget	--
Statement of Compliance Form	--
Organizational Chart	--
Customer Flow Chart	25
Statement of Assurances	--
<i>Total</i>	400

## Section IV: RFP Response Instructions – Comprehensive One-Stop Center

---

### A. General Preparation Instructions

All proposals must be received **by 4:00 p.m. ET on December 9, 2016**. Regardless of the reason, proposals received late will not be accepted and will be returned to sender unopened. Proposals that fail to follow the requirements set forth in this RFP regarding minimum requirements, number of copies and format may be considered non-responsive. The PIC reserves the right to reject any proposals in its sole discretion. Proposals should be delivered to:

**Boston Private Industry Council  
One-Stop Center Request for Proposals  
2 Oliver Street, 3<sup>rd</sup> floor  
Boston, MA 02109**

The submitted proposal package must include one original copy of the proposal in a sealed envelope marked “One-Stop Center Request for Proposals” and one additional copy that is not bound in any way. In addition, an electronic PDF copy saved to a flash drive must be included in the package. However, this electronic version will not serve as the formal proposal submittal. Proposals may be mailed via regular mail, express delivery or hand-delivered. Because this is a sealed bid process, faxed or emailed proposals are not acceptable. 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 a minimum of 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) below. 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 single spacing.
5. Be bound or stapled (the original copy) with dividers and tabs as seen fit. However, for ease of reproduction, do not bind the second copy in any way, or use dividers with tabs.
6. Not include letters of recommendation.
7. Be submitted in accordance with the terms, conditions, and procedures stated in this RFP.
8. Be signed by an authorized signatory (typically a director, president or CEO of an organization or any individual who has authority to negotiate, enter into 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.

## **B. Submission Format**

All proposals must be organized and assembled as described in this Section. Copies of all required forms as identified in the descriptions below are included in the Attachments to this RFP and are not counted toward the 25-page response limit. The proposal must be submitted in the order outlined below:

1. Proposal Cover Sheet
2. Table of Contents, indicating the beginning page for each section and major subsection of the response, including each attachment
3. Executive Summary
4. Proposal Narrative - Follow the order and use the same titles for section headings in the Proposal Narrative Requirements described in Section E.
5. Budget
6. Assurances and Certifications - Follow the order in the Appendices.
7. Attachments - Maybe attached at the bidder's discretion, but bear in mind the WDB's desire to limit extraneous narrative and data. Elaborate or expensive bindings, videos, colored displays, and promotional materials are neither necessary nor desired.

## **C. Criteria**

Each section is weighted by the point scale described in Section III.E. Responses to each of the 8 sections will be evaluated using the following scale.

- Exemplary:* provides clear, complete, detailed information meeting all required criteria; illustrates well-conceived ideas with evidence to substantiate
- Strong:* provides mostly complete and generally sufficient information meeting required criteria; illustrates minor inconsistencies that require clarification or more detail to fully comprehend
- Weak:* provides an incomplete concept that generally or only partially meets criteria; requires significant clarification

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.

## **D. Executive Summary**

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

1. An 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. If submitting as a formal partnership or collaboration, identify all key partners and the lead entity; and
3. A concise description of the proposed services, including a plan to integrate partner services.

## **E. Program Narrative**

Please respond to the following in detail using specific examples or evidence when possible and respond for all proposed job seekers (Adults, Dislocated Workers, TANF), as applicable. If you are currently operating a One-Stop Center, please use One-Stop Center (MOSES) activities and data as examples when responding. Please be as specific as possible and provide examples, where applicable.

### *1. Organizational Structure and Capacity*

An organization's success depends upon the strategy and direction set by leaders informed by data provided by customers, staff, labor market conditions and past history. The One-Stop Center's work processes (departments, functions, individual jobs) should be aligned with one another and in ways that promote cross-learning, service integration and staff development. Staff composition, roles, and competencies should be aligned with current and future needs. Critically important in these demanding times is the organization's efforts to build and maintain a work environment and employee support climate conducive to performance excellence and organizational growth.

- a. Provide a concise description of your organization including the legal status of the organization, the governance structure, and mission and vision and goals along with the major programs currently offered. Explain how your mission aligns with this funding opportunity.
- b. Describe your organization's overall management structure and the extent to which this adequately supports program operations and goal attainment.
- c. Describe your organization's experience in providing services to adults, and older youth, if applicable, and any other relevant experience within the past three years in providing workforce services. Provide examples of how you were innovative, flexible and creative in service delivery.
- d. Describe your experience in working with special populations (i.e., persons with disabilities, ex-offenders, Limited English proficient individuals, public housing residents, and veterans).
- e. If submitting as a partnership or collaborative, please identify all of 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.

- f. Describe what makes your organization stand out above others in its abilities to accomplish the goals of a One-Stop Center.

## 2. *Staffing Plans*

- a. Provide an organizational chart for the operating entity showing the size and structure of the organization and how the One-Stop Center would be integrated into the rest of the organization.
- b. Please describe your proposed staffing plan for the One-Stop Center. It should specify staffing levels and position titles. If known, identify key staff members by name and specify the educational level attained by each individual, their tenure in the role and in general with the organization. It is anticipated that the proposal will include a position for a full time director who will oversee implementation of all services at the One-Stop Center and relevant job descriptions that include the main tasks of each position and the background skills you expect to require, as well as expected salary ranges.

*Note: PIC supports paying minimally the city living wage (\$14.23 per hour) plus benefits to employees. One-Stop Operators will be expected to follow these principles for staff employed at the One-Stop Centers.*

- c. Explain your proposed process for training new staff members on the regulations of WIOA and program requirements. Identify any special skills or certifications of staff including fluency in other languages already existing or that you expect to hire. If possible, identify the annual staff turnover rate for the past three (3) years and address turnover among direct staff and key manager positions.
- d. Describe the special skills and expertise required or expected to be required to be a career coach for your organization and the success measures you use or expect to use. Describe the indicators that best measure the impact your career coaches have on their job seekers, if applicable.
- 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. Describe how you will be flexible with staffing. Explain your expected innovative policies and practices in terms of how you shift staff responsibilities and hours in order to respond to market demand. Describe how you will achieve effective communication and skill sharing across work units, jobs, and locations.

## 3. *Location and accessibility*

From its inception in Boston, a guiding priority for the One-Stop Center system has been a focus on a professional, yet customer-friendly experience. We seek to have a One-Stop Center system that is both centrally accessible by public transportation and that serves the needs of the city's

most challenged neighborhoods. The facilities should have an inviting reception area, a clearly delineated computer resource area, state of the art access to technology including wireless access virtual resources, and flexible meeting space to accommodate a range of events and service modalities.

- a. Describe the physical facilities to be used to house all aspects of the One-Stop Center, including the address and total square footage of the site.
- b. Describe how the One-Stop Center and its services will be accessible to customers outside of the traditional business hours through innovative staffing or uses of technology, etc.
- c. Explain how the services delivered at your One-Stop Center will meet the needs and create a welcoming environment for people with disabilities. Describe how you incorporate information about access, inclusion, disclosure, accommodation and other relevant matters into your marketing materials.

#### 4. *Program Description*

Job seeker services will include a full range of basic, individualized, and training services that will prepare job seekers for a variety of career pathways that are supported by current labor market information and/or meet the needs of employers in greater Boston.

##### a. Job-Seeker Services

Provide a detailed flowchart showing how a job seeker will access all of the services available through the One-Stop Center. The flowchart should be organized to segment the job seeker population based on service needs compared to service availability in order to maximize reemployment efforts. (This does not count against your narrative page total.) Number the boxes and use notes to explain in more detail what is happening at each juncture. Provide an accompanying narrative that explains the philosophy behind the job seeker service strategy and the approaches and methods designed to meet the needs of a diverse job seeker base.

- i. Explain your approach to providing job seeker-centered services.
- ii. Describe how job seekers will be oriented to the One-Stop Center and assessed upon enrollment. Include a description of any tools, tests, or methods used to determine the following: levels of basic skills, work readiness, interests and aptitudes, occupational skills and supportive service needs.
- iii. Describe the process for developing an IEP and setting and managing job seeker expectations.
- iv. Describe the career services offered to job seekers as universal access services.
- v. Explain how and when you will determine WIOA eligibility for individual job seekers.
- vi. Explain when and how job seekers are provided individualized services. Identify the frequency and availability of career services and any innovative features in your service offerings. *Note: Career centers may charge a fee for individualized services and specialized workshops, however, those fees must be waived for WIOA eligible customer.*
- vii. Describe your capacity to offer services in languages other than English, including

any focus on a language(s) that is appropriate to your location and job seeker population.

- viii. Describe how you determine whether job seekers are eligible for training. Explain how you will assist job seekers who are looking for training opportunities that are not WIOA funded. Identify ways your One-Stop Center will ensure job seekers have up-to-date information on financial aid, childcare services and those other resources that help increase access to and retention in education, training, and employment.
- ix. WIOA requires follow-up activities must 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.

b. Employer Services

One-Stop Centers are required to serve employers through an integrated service approach with all mandated partners. Business services include the recruitment of talent; assessments of potential applicants and incumbent workers (may include National Career Readiness Certificate assessments); connecting local business to available resources such as tax credits and other incentives; and, as appropriate, on-the-job training, Registered Apprenticeships, and customized training opportunities. Boston, as part of the state-wide initiative, is interested in a demand-driven approach that connects employers with an array of services to meet the needs of the local labor market.

- i. List and describe your current and/or proposed business services. Explain how you will incorporate a demand-driven approach to service delivery.
- ii. Describe the special skills and expertise required or expected to be required of Business Service/Employer Engagement staff for your organization and the success measures you use or expect to use.
- iii. Identify key business partners, provide an example of two (2) current/past business engagements where you have identified and addressed a business need. Comprehensively explain both the process used and outcomes achieved.
- iv. Describe your strategies for pursuing new business relationships. Identify any tools or data used.
- v. Describe service strategies that are most effective in placing job seekers and how you will maximize the use of those strategies going forward.
- vi. Explain how you are engaged in state-wide employer business strategy. If not, describe a business initiative that has included multiple partners and stakeholders. In each case, describe your goals and outcomes, and the challenges and opportunities you foresee in having a more regional, collaborative approach to serving businesses.

5. *Priority of Service*

WIOA Title I creates a priority of service for public assistance recipients, other low-income individuals, individuals with disabilities, and individuals who are basic skills deficient, that it is consistent with priority of service for veterans. This new requirement is designed to greatly increase the number of individuals served who have substantial barriers to employment.

- a. Describe past success in developing effective working relationships with any WIOA partner organizations (Adult Education Providers, Wagner-Peyser, Vocational Rehabilitation, Temporary Assistance to Needy Families, and Senior Community Service Employment Programs).
- b. Explain how you plan to target services to priority populations and, if available, provide statistics to evidence the percentage of your total population of job seekers currently served that meet this definition.
- c. Describe how you will prioritize services to populations with significant barriers to employment and how you will conduct outreach and recruitment to this population.

6. *Relationship with partners*

A major role of the One-Stop Center is to work in collaboration with the various required partner agencies and service providers to offer seamless services to customers. Under WIOA, partner programs and entities that are jointly responsible for workforce and economic development, educational, and other training programs collaborate to create a customer-focused One-Stop Center system that integrates service delivery across all programs and enhances access to the programs' services. The One-Stop Center system includes six core programs (Title I adult, dislocated worker, and youth programs; Title II adult education and literacy programs; Title III Wagner-Peyser program; and Title IV vocational rehabilitation program), as well as, other required partners (TANF, Second Chance Act programs) and optional partners identified in the local One-Stop Center MOU (Appendix 1).

- a. Provide a sense of the depth of your involvement with the other parts of Boston's workforce development system including ABE, higher education, job training, etc. Provide examples of demonstrated leadership within the system.
- b. Describe your strategies for developing and enhancing coordination with mandated partners. Describe how you will work on site to achieve an integrated system where customer service and performance are high priorities.
- c. Describe how you will manage cross training of all One-Stop Center staff (including partner staff). Explain the impacts or desired results from cross training.
- d. Provide examples of prior collaborations with other partners in meeting an employer's hiring needs.

7. *Technology, Data Management, and Innovation*

One-Stop Centers are required to develop and implement operational policies that reflect an integrated system of performance, communication, and case management, and use technology to achieve integration and expanded service offerings.

- a. Describe your experience in working with a transactional customer database such as the Massachusetts One-Stop Employment System (MOSES), Efforts to Outcomes (ETO), Salesforce, or other databases.
- b. Describe your experience using online tools that job seekers and One-Stop Center staff use in job searches, such as Transferable Occupational Relationship Quotient (TORQ).
- c. Outline how you will ensure citywide access through virtual and One-Stop Center-based services, non-traditional hours of operation, and collaboration with community partners.
- d. Describe any hardware, software, or connectivity enhancement you plan to use to support access to career services and what services will be available on-line for customers.
- e. Describe how you envision a comprehensive One-Stop Center sharing virtual resources with Access Points and other One-Stop Partners.
- f. Provide assurances that you will have the capacity and will use that capacity to track and report data in accordance with all applicable requirements using MOSES or other applicable reporting systems.

8. *Budget*

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

- a. In-kind and cash match resources

In order to efficiently use funds from Wagner-Peyser, WIOA Title 1 Adult & Dislocated Worker, and the state line item to deliver One-Stop Center services to customers, it is increasingly important to leverage a wide-range of public and private resources to support One-Stop 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 particular budget item as long as it supports One-Stop Center activities. Cash match is defined as a contribution of funds made available to the applicant to be used specifically for One-Stop Center activities. Applicants are required to assign a monetary value to any in-kind contribution. These in-kind or cash match resources must directly support the proposed program activities and must be documented with a Letter of Commitment or Memorandum of Understanding. Examples of in-kind resources include but are not limited to:

- Staff time from lead and/or partner agencies (directly related to customers);
- In-kind and cash match from business partners;

- Facilities/Infrastructure (where services are provided);
  - Participant expenses (internship/work experience wages, incentives, supportive services, tuition, books, clothing, etc. for employment); and
  - Equipment (directly related to services to customers).
- b. Describe your revenue strategy for the next year. Include any grants, financial partnerships, and/or fee for service strategies.

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; 3) an accompanying cost allocation plan; and 4) 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 2018. These additional sources of revenue should be included in the match category of the overall budget.

- i. Personnel: For every position you plan to have, please attach a general job description, the resumes of key staff in each position if already staffed or the job qualifications you will expect applicants to have if not already staffed, and the percentage charged to each funding source.
- ii. Fringe Benefits: List all components of the fringe benefits rate, breaking it down by components, percentage rates and amounts. Examples of components are FICA, Medicare, Unemployment, Health Insurance, Retirement, etc.
- iii. Premises Lease: Provide the total lease expenditure and explain how the rent cost is determined and applied to these One-Stop Center funds (i.e., square footage proportionate to the amount of space occupied by program, etc.)
- iv. Travel: Examples of local travel justifications include the number/types of MBTA passes, number of trips/cost per trip and trip destinations. The IRS approved business mileage rate for Calendar Year 2016 is .54 cents per mile. For other travel, particularly if outside the program service area, you must clearly describe the need and cost detail.
- v. Supplies and Equipment: Supplies are those items considered tangible, expendable, personal property. Examples include general office supplies, postage costs, meeting costs/supplies, copies, printing costs and materials. Purchased materials and supplies shall be charged at their actual prices. Care should be taken to identify those supplies directly tied to the program.

*A NOTE ON EQUIPMENT: The Federal definition of "equipment" is tangible, non-expendable, personal property having a useful life of over one year and an acquisition cost of \$5,000 or more per unit. AS DEFINED, EQUIPMENT IS NOT ALLOWED UNDER THIS RFP. If you propose purchasing ANY item of equipment under \$5,000, include it in this category and clearly explain how it will be necessary for the proposed program. It must be used for project related functions, and must not otherwise be available to the applicant. A plan for the use or disposal of the equipment after the project ends must also be included in the justification.*



- c. Other: Any expenses not covered in any of the previous budget categories should be included here. Examples of items include occupancy costs, the lease or rental of equipment, maintenance costs, security costs, telephone costs, dues, subscriptions, utilities, insurance costs not included in the fringe benefits, and where applicable, indirect costs. Justification examples include:
- Utilities: Explain how utility costs were estimated (*i.e.*, square footage proportionate to the amount of space used by the program).
  - Citrix and MOSES Fees: Estimate based on FY 2016 amounts.
  - Other Information Technology: Explain any new and/or ongoing costs anticipated based on transferring away from the DCS system.
  - Security: Describe what type of security is being purchased, for how long, and for what program activities.
  - Maintenance: Explain how maintenance costs were determined (*i.e.*, square footage proportionate to the amount of space used by the program).
  - Insurance: Describe what kind of insurance obtained, at what cost, for what period, and covering what activities.
  - Contractual: Generally, this category is for all non-employees for services or products, and consultants who provide advice and expertise in a specific program area. Your justification should include the total cost, the name of the individuals/organizations, the services or goods being provided, the rate or per diem, etc., and the relation to the program. If your proposal includes a subcontractor providing a substantial amount of the program services, then detailed supporting information and justification must be provided.
- d. Indirect: Indirect charges may be requested, and if the applicant has a federally approved rate, a copy of the approved rate agreement must be submitted. It should be noted that costs included in the indirect cost pool cannot also be charged as direct costs. All requests for indirect charges are examined on a case-by-case basis, and may be funded in whole or in part, depending on the percentage and the availability of funds. Recognizing that not all agencies can request or obtain a federally approved rate, other requests will be reviewed and considered if they are clearly substantiated, preferably by a third party, independent accounting professional.

## **F. 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 correct any error(s) and/or make changes to this RFP as it deems necessary at any time.

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 award one or more contracts for any items/services solicited via this RFP.
7. 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 in order to successfully meet the needs of the LWDA.
8. 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.
9. 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.
10. 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.
11. 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 back 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.

## **G. Right to File a Grievance**

### **1. Local Appeals Process**

After the Boston PIC completes its review of all proposals properly submitted, it will notify all applicants in writing by overnight mail whether or not they have been selected as a proposed One-Stop Operator. Parties who submit proposals that are not selected as proposed One-Stop 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 One-Stop Operator a proposal that receives the highest score based upon the application of the proposal review scoring criteria. Instead, proposed One-Stop Operators shall be selected based upon a more comprehensive review and analysis that shall take

into account 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 of time 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 make a determination 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).

*Note: If the appeal is granted, the review and approval process may be reopened at the appropriate point. The PIC reserves the right to award charters on a conditional basis during the appeal period. At the PIC's discretion, final full funding for all related proposals may await completion of the appeal process.*

*Note: The PIC 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 whenever it is determined that such action is in the best interest of the Boston PIC.*

## 2. 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 respondent 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 make a determination 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 single 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 V: Attachments

---

Appendix 1: Interim Local MOU

Appendix 2: Boston Performance Measures

Appendix 3: Career Services

- Wagner-Peyser Services
- WIOA

## **A1: Local Interim MOU**

### **Workforce Innovation and Opportunity Act (WIOA) Interim Memorandum of Understanding (MOU) Agreement**

The Local Board, in agreement with the CEO and local required WIOA One-Stop Partners and other stakeholders (as defined locally) will enter into this interim “umbrella” Memorandum of Understanding (MOU). The period of the interim MOU will be effective for Fiscal Year 2017 (July 1, 2016 through June 30, 2017); the activities undertaken during this period will result in a comprehensive WIOA Umbrella MOU, fully executed by July 1, 2017.

The Local Board assures it will act as the convener of local MOU negotiations and together with Required Core and Mandated Program partners and other stakeholders (subject to local determination) will develop a Local Area “umbrella” MOU that will shape how the local one-stop services are delivered;

The Local Board assures the MOU will be in compliance with all requirements under WIOA, the final WIOA regulations and WIOA Joint Partner Communication 01.2016.

The Local Board assures that partner negotiations will begin effective July 1, 2016 and be completed on or before June 16, 2017;

The Local Board and Required Partners assure that these negotiations will maintain a collaborative and “good faith” approach by fully engaging Partners, transparently sharing information and maintaining a shared focus on the needs of the job seeker and business customer;

The Local Board and Required Partners assure they will participate in negotiations to develop a Local “umbrella” MOU that will delineate shared service strategies for job seekers and businesses and identify related shared customer flow strategies that will include but not be limited to operational and service workflows, related referral processes, coordinated staff development and training, marketing and community integration, co-locations of staff (physical or virtual) and the nature and provision of related infrastructure and shared costs;

The Local Board and Required Partners assure these strategies will be designed locally to meet the service, resource and technology needs of the center and take into consideration the individual characteristics, service needs and resources of each of the mandated partners;

The Local Board and Required Partners assure these strategies will be both data and demand-driven to further support the development of local service strategies and the needs of businesses and job seekers;

The Local Board and Required Partners assure that these strategies should reflect the intent of the Combined State Plan submitted on behalf of the Governor of the Commonwealth;

The Local Board and Required Partners assure that the MOU will include agreements on the specific infrastructure/shared costs and agree that the method by which revenue and costs will be supported by



each partner will be in accordance with Federal cost principles, which require that all costs must be allowable, reasonable, necessary, and allocable to the program and all other applicable legal requirements.

**Signatures:** By signing this agreement, all parties agree that the provisions contained herein, are subject to the applicable Federal, State and Local laws, regulations and guidelines. By signature affixed below, the parties specify their agreement.

Trinh Nguyen	OWD
Theresa Polhemus	EDIC
Neil Sullivan	Boston PIC
Kenneth Montgomery	Boston PIC / WDB
Rosemary Alexander	DCS
Robert Cunningham	DUA
Frantz Monestime	DTA
Mary Mahon-McCauley	MA Rehabilitation Commission
Ulyena McPherson	MA Commission for the Blind
Jerry Rubin	JVS (Local Career Center Operator)
Joanne Hilferty	Morgan Memorial Goodwill Ind. (Local Career Center Operator)
Deboraj JacQuie Cario Williams	Urban League of Eastern MA (SCSEP Program)
Tea Provost	Operation Able of Greater Boston (SCSEP Program)

*Adult and Community Learning Services Designees*

Richard Goldberg	Asian American Civic Association
Marie Harris	Adult Ed. and Community Services BPS
Carol Baglio	East Boston Harborside Community Center
Barbara Garner	JVS Education
Daniel Martini	Suffolk County Sheriff's Department

**A2: Boston Baseline Measures – All Centers.**

Performance Measures FY 2014-2017

A	B	C	D	E
Program Activity in MOSES	July-June FY2014	July-June FY2015	July-June FY2016	Planned FY2017
<b>A. Job Seekers Services</b>				
1. Total Job Seekers Served	19,854	16,799	15,661	14,000
a. Total Job Seekers Unemployed	18,742	15,659	14,199	12,600
b. Persons with Disabilities	977	848	850	840
c. UI Claimants Served	9,120	8,739	8,370	7,280
d. Veterans Served	780	544	526	525
<b>B. Employer Services</b>				
1.Total Employers Served (= 1.a + 1.b)	538	321	380	400
a. New to One-Stop Center	291	155	229	235
b. Repeat	247	166	151	165
2. Employers Listing Job Orders	221	152	152	150

## **A 3: Career 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 analyze 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 farm-workers, 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 One-Stop 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 is able to 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 One-Stop 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 One-Stop 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:
  - Providing assistance 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:** One-Stop Centers must maintain a publicly accessible resource area (including access for disabled persons) 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, services and 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:** One-Stop 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. One-Stop Centers must post and follow a monthly schedule for all workshops.

## 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 One-Stop Center for Title I of WIOA. One-Stop 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 One-Stop 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 as a result 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, in order for an individual to obtain or retain employment. Individualized career services are more comprehensive, in-depth and individualized than basic career services, and generally 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.

One-Stop 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, in order 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;
- i. Internships and work experiences that are linked to careers;
- l. Workforce preparation activities;
- m. Financial literacy services (such as financial aid applications, income tax credits and counseling);
- n. Out of area job search assistance and relocation assistance; and
- o. 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 in order 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;
- Is in need of 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

- Have 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.

- Individual Training Accounts (ITAs):** ITAs are tuition vouchers that may be redeemed at any one of many eligible training providers. The One-Stop 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.
- Pre-Apprentice Training:** Pre-apprenticeship programs provide training to increase math, literacy, and other vocational skills needed to gain entry into 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.
- 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 in order 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. One-Stop 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. One-Stop 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 regional economy;
- Prepare an individual to be successful in any of a full range of secondary or 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 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:**

One-Stop 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), One-Stop Centers are required to offer universal access – providing all job seekers with intake, orientation to the One-Stop Center system, determination of eligibility, and access to the One-Stop Center resource area. One-Stop 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 One-Stop 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.

One-Stop 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 One-Stop Center services. (See WIOA Communication 01-45 or subsequent WIOA communication when issued.)

## 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:		Phone:
Contact Person:		Title:
		Email:

Taxpayer Identification No: (Federal Identification Number)

--	--

Applying as:	<input type="checkbox"/> Single organization with no contracted services
	<input type="checkbox"/> Single organization with contracted services

--	--

**List of Contracted Service Partner Organizations**

Organization:		Contact Person:
Address:		Services Provided:

--	--

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: \_\_\_\_\_

## **F2: Proposal Checklist of Materials to Be Submitted**

One-Stop Career Center Operator Proposal Submission Components:

- One (1) electronic copy (in .pdf format via USB flash drive) of entire submission
- One (1) Original (so marked with original signatures) and one (1) copy of the following:
- 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
- Last two years of financial audits with accompanying management letters
- 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 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 on a monthly basis. 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 polices 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**

*Available on Website*

**Section VI: Required Forms**  
**F5. Budget Forms - Overall Budget**

Career Center:

Operator:

**Overall Budget:                                 \$0.00**

<b>DESCRIPTION</b>	<b>Amount requested from grant</b>	<b>Amount provided through match</b>	<b>Total Amount</b>
<b>CAREER CENTER PROGRAM BUDGET</b>			
1. Personnel	\$0.00	\$0.00	\$0.00
2. Fringe Benefits	\$0.00	\$0.00	\$0.00
3. Occupancy	\$0.00	\$0.00	\$0.00
4. Travel	\$0.00	\$0.00	\$0.00
5. Supplies & Equipment	\$0.00	\$0.00	\$0.00
6. Contractual	\$0.00	\$0.00	\$0.00
7. Other	\$0.00	\$0.00	\$0.00
8. Indirect	\$0.00	\$0.00	\$0.00
<b>TOTALS</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>



Section VI: Required Forms  
F5. Budget Forms - Budget Detail

Career Center:

Operator:

**Line Item Budget Detail**

*Please add lines to each subsection as needed.*

1. PERSONNEL					
(a)		(b)	(c)	(d)	(a)*(b)*(c)*(d)
# FTE	Position	Salary per pay period or hourly rate	Amount requested from grant	Amount provided though match	Total
1	job title	\$0.00	0.00	0.00%	\$0.00
1	job title	\$0.00	0.00	0.00%	\$0.00
1	job title	\$0.00	0.00	0.00%	\$0.00
<b>TOTAL PERSONNEL</b>					<b>\$0.00</b>

<b>2. FRINGE BENEFITS</b>	Rate	0.00%	<b>\$0.00</b>
---------------------------	------	-------	---------------

OPERATIONAL COSTS	
<b>3. OCCUPANCY</b>	\$0.00
<b>4. TRAVEL</b>	\$0.00
<b>5. SUPPLIES &amp; EQUIPMENT</b>	\$0.00
<b>6. CONTRACTUAL</b>	\$0.00
<b>7. OTHER</b>	\$0.00
<b>8. INDIRECT</b> Rate: 0.00%	\$0.00
<b>SUBTOTAL OPERATIONAL COSTS</b>	<b>\$0.00</b>
<b>TOTAL: PROGRAM</b>	<b>\$0.00</b>

