



**REQUEST FOR PROPOSALS
COMMUNITY DEVELOPMENT BLOCK GRANT – PUBLIC SERVICES
FY 2016 – FY 2017**

Issued By:

**The City of Boston
Martin J. Walsh, Mayor**

**Office of Jobs and Community Services
Trinh Nguyen, Director**

RFP Issue Date: February 20, 2015

RFP Closing Date: March 27, 2015

Inquiries:

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JCS is a division of the Boston Redevelopment Authority.

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RFP TIMELINE

Request for Proposals Issued Website: http://www.bostonjcs.org	February 20, 2015
Bidders' Conference City Hall, BRA Board Room, 9 th Floor	March 4 , 2015, 10:00 AM – 12:00 PM
<u>Required</u> Letter of Intent Due E-mail: cindy.chow@boston.gov	March 6, 2015 by 5:00 PM
Response to RFP Due Mail to or hand delivery at: 43 Hawkins Street Floor 3B, Boston, MA 02114	March 27, 2015 by 4:00 PM
Contract Start Date	July 1, 2015

I. OVERVIEW

RFP OVERVIEW AND PURPOSE

The Mayor's Office of Jobs and Community Services (JCS) is the City of Boston's workforce development agency. Under the leadership of Mayor Martin J. Walsh, JCS administers funding from various sources for the purpose of supporting a broad range of services including education and training, career development, job training, adult basic education, and youth employment services leading to greater economic security. One such funding source is the Community Development Block Grant – Public Services (CDBG-PS).

Each year, the City of Boston receives CDBG funds from the U.S. Department of Housing and Urban Development (HUD) through the Department of Neighborhood Development (DND). The funds are primarily used for affordable housing and economic development activities. However, up to 15% of the funds can be used for "public services" related to economic development. As the City's workforce development agency, JCS manages this portion of the funding on behalf of DND. The public services component of the CDBG is intended to provide services for low-income individuals and families with a goal of moving them out of poverty towards economic security.

This Request for Proposals (RFP) solicits competitive proposals for services under CDBG-PS. As a division of the Boston Redevelopment Authority/Economic Development and Industrial Corporation (BRA/EDIC), JCS will handle all questions concerning this RFP, review all submissions, and prepare funding recommendations.

PRIORITIES FOR CDBG-PS FUNDING

The priorities for funding in this RFP were developed through a planning process conducted over the past several months. A draft statement of policy priorities was issued for comment in January, followed by a public hearing on January 16, 2015. A broad range of individuals and community organizations participated in the hearing, providing valuable commentary which helped to further focus priorities for this funding. Comments received there were taken into consideration in finalizing the policy principles, which can be found on the JCS website at www.bostonjcs.org.

For FY 2016, JCS will prioritize programs and services aimed at placing low-income Boston residents on a continuum of quality education, training, workforce development, and economic security programs. This continuum is defined as high school diplomas/Hi-Set attainment, matriculation into post-secondary education or industry-recognized training programs, placement into jobs with demonstrated career paths, and/or access to income maximization programs that stabilize individuals and families with barriers. JCS has developed a visual of this economic opportunity continuum, which can be found in Appendix C.

Preference will be given to programs offering employment, education/training, and economic security as a continuum with an integrated approach, where individuals can take advantage of multiple services to help them become economically self-sufficient. Employment programs, when combined with post-

secondary education/training and critical economic security services, are capable of promoting sustained, significant change in the lives of low-income individuals.

For certain populations, like seniors and individuals with disabilities, emphasis will be placed on economic security programs that allow them to retain their current employment and/or allow them to lead stable, economically self-sufficient lives. JCS defines economic security programs as income maximization programs that allow individuals to access public and private benefits. Programs emphasizing the economic security component on the continuum pathway must indicate in their narrative the specific dollar amount in public and private benefits that participants will obtain to maximize their income. Applicants successfully integrating the three program components that include employment, education, and economic security programs, if funded, will likely be funded at the higher range of the grant.

FUNDING AVAILABILITY AND PERIOD OF PERFORMANCE

At the issuance of this RFP, the City has not been informed by the U.S. Department of Housing and Urban Development (HUD) of the allocation of CDBG funds for Fiscal Year 2016. Since it is unlikely that there will be an increase, this will be a highly competitive procurement for limited funds. The total allocation for the current FY 2015 is approximately \$2.3 million. To optimize our grant dollars, JCS intends to award fewer grants in larger amounts ranging from \$35,000 - \$90,000 for a period of one year to successful applicants.

JCS does not predetermine the amount of funds to be dedicated toward each program model. The type and quality of proposals submitted will determine the funds awarded. Open and competitive procurement typically occurs on a two-year cycle. Contracts resulting from this RFP are anticipated to commence July 1, 2015 and end on June 30, 2016. Contracts are awarded for a one-year period, and a re-funding process determines the second year of funding. Re-funding for FY 2017 will be contingent upon satisfactory program performance, approval of a re-funding application, and the availability of federal funding.

II. ELIGIBILITY CRITERIA

ELIGIBLE APPLICANTS

This is an open and competitive procurement process. Eligible applicants must hold 501(c)(3) status under the Internal Revenue Code, be in the process of receiving such status, or have an identified fiscal sponsor holding 501(c)(3). In addition, JCS is interested in proposals with the following competencies:

- JCS gives priority to community-based organizations with a track record of providing services to low-income residents of the city while maintaining high standards of program management and accountability. Faith-based organizations proposing to provide services in a secular manner are eligible to apply; however, public resources cannot be used to promote a particular religious point of view.
- JCS gives priority to proposals that incorporate partnerships and collaborations under this RFP. Partnerships focusing on seamless integration of services are strongly encouraged to ensure that there are no gaps in the continuum of programs and services. Partnerships are urged to include a broad spectrum of stakeholders, including but not limited to employers, institutions of higher education, one-stop career centers, adult basic education providers, and community-based organizations. Each applicant may apply as the lead applicant for only one proposal. Applicants may be members of more than one partnership under this RFP. Applicants may also serve as a fiscal agent for more than one organization.

ALLOWABLE USE OF CDBG-PS FUNDS

- CDBG funds must be used to provide direct services as outlined in this RFP.
- CDBG funds may not be used to replace local or state government funds. Funds may be used to provide new or expanded services, but not for specific activities which have lost local or state funds within the past twelve months.
- CDBG funds may not be used to fund political activities.

PARTICIPANT ELIGIBILITY AND TARGET POPULATIONS

All participants served with CDBG funds must meet all of the following eligibility characteristics:

- Documented residents of the City of Boston. Non-residents *cannot* be served with these funds.
- Individuals, including youth, adults, and seniors with household incomes below the 80% of area median income for Boston, as defined by HUD¹. The current 80% of median figures for Boston are shown in Appendix B. CDBG funds are required by law to benefit individuals with this income level. Programs are also required to report on how many participants fall below 50% median and 30% median income.

¹ HUD income guidelines change every year. Successful FY 2016 CDBG applicants will receive the most current HUD income guidelines.
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- Preference will be given to re-entry or court-involved individuals; out-of-school youth; seniors; persons with disabilities; homeless individuals; documented immigrants; English Language Learners; dislocated workers; long-term underemployed or unemployed individuals.

III. SERVICES REQUESTED

JCS seeks proposals for programs offering a continuum of services that create a pathway to a career and/or economic stability that includes job training, education, and economic security components. Preference will be given to proposals incorporating all three components that lead to employment at livable wages. Individuals with limited education or job skills find it difficult to attain higher wages or skills for advancement. Attainment of high school diploma/Hi-Set, post-secondary education and/or training increases an individual's chances of advancing economically while addressing the skills and earnings gap in Boston.

The goal of this RFP aligns with the city-wide economic opportunity agenda that tackles income inequality for Bostonians. JCS is aware that there are not enough funds to go around to support multiple continua of programs and services – so under this RFP, JCS will be looking for organizations to work together to build a structure to provide a full set of education, employment, and economic security programs; to that extent, JCS encourages applicants to partner and clearly define each partner's strengths, roles and responsibilities under this RFP.

JCS defines a career pathway continuum as an effort that provides a clear sequence of activities and a connection between education, training programs and economic security services that leads to employment. Career pathways allow participants to progress from one level to the next to build skills that lead to improved career prospects. Career pathways prepare and place individuals into jobs in high-demand and high-wage industries with increased earning opportunities by providing industry-recognized credentials, certificates, and degrees.

In order to show that a program is aligned with employer needs, applicants must present data documenting need in the occupations they are targeting and provide evidence of strong employer involvement in the form of a detailed Memorandum of Agreement/Letter of Support. Multiple employer partners are encouraged.

Under this RFP, JCS seeks innovative models or approaches which respond to the needs of target populations and employers in today's changing economy. Described below are allowable program types under the three pillars of a career pathway continuum:

- **Employment:** Employment programs can include occupational skills training, pre-apprenticeship, apprenticeship, career exploration, on-the-job training, and transitional employment programs. These programs provide individuals with specific skills needed for a particular occupation with living wages, and opportunities for advancement and wage progression. Employer engagement may be demonstrated through involvement of employers in the development of curricula and agreement to interview program graduates. In addition, employer engagement can include job shadowing and mock interviews. Employment programs include job readiness services as well. Re-entry programs will need to demonstrate the involvement of committed employers willing to hire ex-offenders. If the target population requires evening or weekend programming, applicants should design programs with hours meeting that need.

- **Education:** Education programs can include alternative education, Hi-Set programs, adult basic education (ESOL and Hi-Set) and post-secondary education programs. These programs provide individuals with credentials, certificates, and degrees necessary to obtain a career. JCS understands that post-secondary education can take more than two years for target populations to complete. JCS is interested in seeing proposals that not only provide opportunities for individuals to enroll in post-secondary education, but also provides supportive services that help them persist and complete the program. The training incorporates basic education and soft skills development to meet the needs of the target population. If the target population includes documented immigrants, English Language Learners, long-term underemployed or unemployed individuals, bridge programs and adult basic education programs can also be included as part of the continuum to accelerate credentials and skills building, but generic, stand-alone bridge programs unconnected to employment and/or post-secondary education/training will not be considered responsive to this RFP.

- **Economic Security:** Economic security programs include income maximization services, defined as any public or private benefits that are not earned through wages from employment. These can include but are not limited to SNAP, TAFDC, EITC, SSI, SSDI, alimony, child support, unemployment insurance, pension/retirement, and disability benefits. Income maximization programs provide individuals with cash-equivalent benefits that allow them to stabilize their economic situations. In addition, economic security programs also include increases in income due to wages from employment. Asset building strategies and financial literacy programs to help individuals manage their finances that lead to greater economic security are also considered responsive to this RFP.

JCS prioritizes programs that incorporate all three critical components of a career pathways model – employment, education/training, and economic security. However, for certain populations, like seniors and individuals with disabilities, emphasis will be placed on economic security programs that allow them to retain their current employment and/or allow them to lead stable lives.

SET OF PROGRAM DESIGN PRINCIPLES

In funding career pathways continuum services, JCS adheres to a set of principles, which include:

- Provision of a career pathways continuum that leads to jobs that pay living wages/family-sustaining jobs or at a minimum Boston’s official Living Wage, currently at \$13.89/hour.
- Innovations in program design to address the needs of a wide range of nontraditional and low-income individuals.
- Sound recruitment strategy.
- Coordination between programs and partners to provide sequences of activities in employment, education, and economic security.
- A high degree of coordination of wrap-around support services to address a wide range of individual and family needs.
- Partnerships that include employers and institutions of higher education in program development and implementation activities.

- Investment in comprehensive assessment processes that value a high degree of customer direction in program choice.

REQUIRED PROGRAM ELEMENTS

- **Career pathways continuum structure.** Applicants must illustrate in their proposal a clear career pathways continuum model, indicating what services will be provided and by who for program participants, including education, training, employment, and/or provision of economic security services. The illustration must include specific job(s) that program participants are expected to obtain upon successful completion of a pathway. Career pathways must identify specific steps of activities that lead to placement into jobs or post-secondary education/training. Applicants may illustrate their model using graphics or a simple table. Applicants proposing to provide an economic security program for specialized populations are not required to illustrate their program models graphically.
- **Recruitment.** Applicants must demonstrate in their proposal an understanding of the target population they have chosen. Applicants must be capable of executing a comprehensive recruitment strategy for the target population, and must show how the strategy they propose will lead to the desired level of enrollment.
- **Participant assessment.** In order to ensure participants are successful and receive appropriate services, a thorough and in-depth assessment of the prospective participant is essential. Applicants should explain the process they use to assess potential participants, the steps and tools involved, and how their assessment protocol improves the service model. Intake and assessment should flow into and directly inform case management and the delivery of services. Individuals found to be not ready for the program must be referred to appropriate services. Attendance, conduct, and termination policies must be consistent.
- **Partnership plan.** A strong partnership is critical for collaborative proposals. Applicants must establish a plan that clearly identifies which organization is providing which service for program participants, including educational, training, and employment services, provision of case management programs, provision of economic security services, and/or job placement and retention services. Partnerships can include but are not limited to employers, higher education institutions, and other community-based organizations with expertise in serving the target population.
- **Case management and wrap-around support services.** A clear case management strategy for a coordinated response to participants' needs is essential to their success. This begins with one-on-one case management and the development of an individual service plan based on a thorough assessment of the individual's assets and aspirations, as well as any barriers to employment/education/economic security. The plan must be jointly developed with the participant, and regularly reviewed by the service provider team and the participant. The plan should have clearly-stated education, training, employment, and/or economic security goals with projected start and end dates for all activities. Applicants should clearly demonstrate how case management is integrated into their service model. Effective case management assists

participants in overcoming multiple barriers to success, including but not limited to scheduling difficulties, immigration issues, transportation problems, child care issues, and financial challenges. Case managers should monitor participant attendance and performance and problem-solve with them as necessary. After placement into jobs or post-secondary education/training, staff should continue to provide support as needed to ensure retention and to address concerns participants may have.

PERFORMANCE STANDARDS

The intent of this RFP is to place Boston residents on a continuum of services in employment, education, and economic security. The outcomes for programs funded under this RFP are organized around three areas: employment, education, and economic security.

For certain populations or certain occupations, temporary jobs, part-time jobs or subsidized jobs may be a strategic first step – these interim/intermediate outcomes will be considered successful short-term or mid-term outcomes. Placement into bridge programs may also be a strategic first step towards employment. Applicants proposing such strategies, however, must make a compelling argument in their favor and demonstrate a continuum of career pathways to better jobs (i.e. increased hours, unsubsidized jobs, etc). Placement into post-secondary education/training, with a strong likelihood of it leading to jobs, will be considered a successful outcome. Applicants proposing economic security outcomes must identify the specific dollar amount that participants will obtain as a result of income maximization services and/or employment. Applicants are not required to produce all of the outcomes listed below within the scope of this RFP – however, applicants must demonstrate how their career pathways continuum will eventually lead to long-term outcomes of attaining jobs at livable wages.

Employment Outcomes

- Number and percentage of participants who obtain employment. Employment can include part-time jobs and unsubsidized jobs.
- Number and percentage of participants who retain their jobs at 30 days.

Education Outcomes

- Number and percentage of participants who obtain high school diplomas/Hi-Set.
- Number and percentage of participants who obtain post-secondary degrees and industry-recognized certificates.
- Number and percentage of participants who are placed into skills training programs, such as occupational training, pre-apprenticeship, and apprenticeship programs.
- Number and percentage of participants who are placed into post-secondary education, including community colleges and universities.

Economic Security Outcomes

- Number and percentage of participants who have obtained or experienced an increase in cash-equivalent benefits, with specified dollar amount.

- Number and percentage of participants who have experienced an increase in income as a result of wages from employment.
- Other financial/asset-building metrics, defined by applicant.

PROGRAM MONITORING/REPORTING

JCS will conduct site visits to monitor compliance and quality of services. This includes:

- Achievement of objectives in accordance with proposal and contract;
- Integrity of administrative systems and eligibility determination; and,
- Quality of service evaluation through observation and informal interviews

These monitoring activities may take the form of administrative record reviews, interviews of staff and/or participants, and general observations of the facilities, operations and training activities. Participants not adequately documented as CDBG-PS eligible will not count towards outcome measures.

Applicants must demonstrate the capacity to perform administrative responsibilities including: maintaining records of participant eligibility, attendance and progress; tracking participation; and submitting program reports and invoices in a timely manner.

FINANCIAL MONITORING/REPORTING

Site visits will also be used to monitor financial compliance with CDBG and other applicable regulations.

If your agency expended \$750,000 or more in federal financial assistance, from any and all funding sources during the most recent audit period, you are required to have an audit prepared in accordance with the most recent guidance from the Federal Office of Management and Budget (OMB). This guide, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance or "UG"), replaces OMB Circular A-133. The complete text of this audit guidance can be found at 2 CFR Part 200, Subpart F in the Code of Federal Regulations. A complete copy of the UG-compliant audit report must be submitted, along with a copy of any management letter (if one exists). Agencies subject to the Uniform Financial Statements and Independent Auditor's Report (UFR) filing requirements of the Commonwealth of Massachusetts may use the UFR format.

If you expended less than \$750,000 in federal funds, and are exempt from the UG audit requirements, then a statement attesting to that fact must accompany your audited financial statements.

If you expended less than \$750,000 in federal funds, but are subject to the UFR filing requirements of the Commonwealth of Massachusetts, then you should submit a complete copy of your agency's UFR.

Applicants are encouraged to share this information with appropriate fiscal staff to ensure that the audit report submission is correct and complete. Proposals that do not contain a complete audit report submission will be considered incomplete.

IV: PROPOSAL GUIDELINES

Please complete and include the Proposal Cover Sheet provided in Appendix D. This does not count toward the 15-page limit. Items #1 - #7 below do count toward the 15-page limit.

1. One-Page Proposal Summary

Briefly describe your proposed program, including specific target population, number of participants to be served, program site(s), start and end dates, industry sectors, employers and positions to be trained for, educational, employment, and/or economic security outcomes, and other key features of your program. Identify any partners with whom you will collaborate to offer key components of the program design.

2. Agency Background and Organizational Capacity

Briefly describe your agency's overall history and its previous experience in providing the specific services proposed. Describe your experience and expertise in any or all of the three critical components of career pathways: employment, education/training, and/or economic security. Include information about your partnership, briefly describing each partner's roles and responsibilities under this RFP – indicate your partnership's positive impact on your service to target populations in the past, if applicable. If you were to receive a contract, would it expand existing capacity or support a new feature in your program?

Provide a description of your organization's track record in the service you are proposing. Include size of service population and any performance outcomes, including secondary, post-secondary education/training credential achievement, job placement and retention, and financial security achievement.

3. Target Population

Please describe the characteristics and needs of the specific populations you intend to serve, assuming the reader is unfamiliar with the population. If more than one group is targeted, provide information for each group. What are the challenges and opportunities for these individuals? How does this population differ from the general population? What direct experience have you had with members of this population and how did you accommodate their needs? Which aspects of your program are designed specifically to address the challenges faced by this population? Include data supporting your agency's ability to achieve successful outcomes with the target group.

4. Program Design

Describe in detail your proposed design for offering each of the following required components. Explain how these functions, as designed, are appropriate for your target population and its needs.

- Career pathways continuum structure: Describe your career pathways continuum structure, including what services will be provided for program participants, whether it is

education/training, employment, or provision of economic security services – or all of the three components integrated. What are the specific job title(s) (with wages) that program participants might obtain upon successful completion of your pathway? Include a graphic illustration of your career pathways continuum model. The illustration must include specific job(s) that program participants are expected to obtain upon successful completion of a pathway. Career pathways must identify specific steps of activities that lead to placement into jobs or post-secondary education/training. Cite appropriate labor market information supporting your choice of targeted occupations. What is the economic significance of sector(s) to the regional economy? What are advancement opportunities for your choice of targeted occupations/sectors and how will participants get from one step to the next to move closer to the final outcome of job attainment? Describe how employers will work with your program. Describe your education/training component. What specific education/training programs will participants enroll in? Describe how your proposed education/training programs will lead to jobs with livable wages. Describe your economic security programs and how your programs are helping target populations retain employment and/or lead financially secure lives. For income maximization programs, describe public and private benefits your participants are expected to obtain. Applicants proposing to provide economic security program for specialized populations are not required to attach their program models. Describe your proposed program schedule describing the duration, intensity, and location of key components of your program design.

- **Recruitment:** Discuss your plan for recruitment, including the specific target group you will recruit, the neighborhoods they live in, the organizations and audiences with which you will communicate, and the tools and methods you will use. How large a pool of recruits will you need to bring into your intake process in order to identify the cohort of enrolled participants you propose to serve?
- **Assessment:** Describe the initial interview and assessment process you will use to determine individuals' education/training, employment, and economic security needs and to develop an individual service plan for each participant. Identify the specific skills assessed and the tools used. What happens to individuals who are determined to be unready or ineligible for your program? How will you ensure smooth and supported referrals? How will you know if your participants are attaining the appropriate competencies? Describe how you will work with the individual to reach agreement on the plan and make modifications as necessary.
- **Partnerships:** Describe in detail the ways in which your partnership will contribute to the success of your program. Clearly define the roles and activities of the partner organizations. Attach a Memorandum of Agreement (MoA) or Letter of Support between your organization and the partners outlining the responsibilities and contributions of partner organizations. The MoA/Letter of Support must be signed by the CEO of each organization or a designee who has senior operational authority.
- **Case management and wrap-around support services:** Discuss your organization's case management system, including the range of services participants will receive through case management, and how you will maintain a strong, effective presence for participants during

the assessment and follow-up periods. Who will provide case management? How often? Who will offer career counseling and job placement services? What system do you use for documenting, tracking and sharing case management information?

5. Staffing

Please describe the staffing plan for the proposed program. Identify by name the staff members responsible for this program, briefly describing their experience and qualifications, as well as their roles and responsibilities. Identify the staff who will manage the participant tracking system. Attach job descriptions and resumes for all positions involved in the project, noting whether they are to be funded or provided in-kind. Identify which staff and/or functions are direct service and which are administrative. Label the job descriptions with the name of the staff person, or indicate if the position is vacant. Label the resume with the name of the position in the program.

6. Outcomes

Provide anticipated outcomes for services described. Applicants must clearly indicate the number of people to be served and expected outcomes in number and percentages for the proposed program. What outcomes will be achieved in year one? Please complete and include the Outcomes Form provided in Appendix E. Briefly describe what database your agency currently uses to track performance outcomes. How will you evaluate the effectiveness of your program? Describe partner commitments to provide data needed to evaluate program effectiveness.

7. Sustainability Plan

Summarize your agency's total budget, and describe the source and amount of non-CDBG funds committed and pending for the specific services proposed in this application. Please attach a list of all current program grants and contracts for the specific services, including project title, source, amount, contract period, and status (e.g. pending, committed). Assuming your program is funded, describe your sustainability efforts, including how your agency would deal with a possible reduction of funding in the second year of this two-year funding cycle, and how this would impact your program.

8. Budget (this is not counted in 15-page limit)

Using the forms provided in Appendix F, present a budget cover page, a cost detail page and a budget narrative for the CDBG funding you are requesting. Each form is a separate worksheet in the Excel workbook. Applications that do not include these forms will not be considered. The job titles and staff initials listed on the cost detail page should match the job descriptions and resumes attached as described above.

These forms should show CDBG funds only. Use the budget instructions page in this RFP as a guide for the requirements under each budget category. The total project budget must reflect the program plans and proposed staffing patterns. Please double check your calculations; all costs must tie out exactly; do not round off. The budget narrative should present descriptive detail on all line item costs

in the budget, so that readers will not be left with questions about how you propose to use the funds.

Collaborative proposals should submit one set of budget forms that clearly identifies the project costs of each agency. The minimum grant award is \$35,000. The maximum grant award is \$90,000. Do not submit a proposal for less than \$35,000 or more than \$90,000. Each applicant may apply as the lead applicant for only one proposal.

V: TERMS OF PROCUREMENT

APPLICATION DEADLINE

Responses to this RFP must be received by JCS by 4:00 PM on Friday, March 27, 2015. It is the sole responsibility of the applicant to ensure their proposal is complete and submitted on time. Proposals can be mailed to or hand-delivered at:

**Jobs and Community Services
Planning and Policy Development, Floor 3B
43 Hawkins Street
Boston, MA 02114**

The office is located near City Hall, behind Channel 7 and the Area A police station. It is within walking distance of the State Street, Haymarket and Bowdoin subway stations. Parking in the vicinity of the office is difficult; allow extra time if you are driving.

Proposals not received by this time will be disqualified from the competitive process. Facsimiles and electronic submissions will not be accepted. JCS will provide confirmation upon receipt.

LETTER OF INTENT

A letter of intent is required. Letters of intent must be received by JCS no later than 5:00 PM on March 6, 2015 via email to Cindy Chow at cindy.chow@boston.gov. Please complete the information using the form *Appendix A: Letter of Intent to Bid*. All applicants will receive email confirmation upon receipt. Should you subsequently decide not to submit, please let us know via email to Cindy Chow.

BIDDERS' CONFERENCE

Organizations interested in bidding on the RFP are strongly encouraged to attend the scheduled Bidders' Conference on March 4, 2015. Questions and answers provided at the Bidders' conference will be made available to the public on JCS' website at <http://www.bostonjcs.org>

SUBMISSION OF INQUIRIES

Questions regarding this Request for Proposals should be submitted in writing to Midori Morikawa, Senior Planner for Youth Services, via email: midori.morikawa@boston.gov. Phone calls will not be accepted.

Responses to questions received during the procurement process will be posted on the JCS website at: <http://www.bostonjcs.org>. It is the bidders' responsibility to check the website for updates and postings. JCS is an Affirmative Action/Equal Opportunity Employer. Auxiliary aids and services are available upon request to individuals with disabilities.

PROPOSAL SPECIFICATIONS

Applicants should ensure their proposals comply with the following requirements:

- A response to each section of the RFP is required and should follow the guidelines and sequences as specified in the Proposal Guideline section (Section IV). Each section should be labeled.
- Every section of the Request for Proposals should be completed in full. If funded, the proposal will provide the basis for contract negotiations, and final negotiated terms will be incorporated within the contract as the Statement of Work.
- Proposals should be typewritten, double-spaced, in 12-point font, printed single-sided with one-inch margins.
- The proposal narrative may not exceed 15 pages. The page limit does not include the one-page summary form, budget forms, or any required attachments.
- JCS requires one (1) original proposal and six (6) copies. The original should be clearly marked as such, and should contain original signatures by your agency signatory. The original should not be bound, but placed in a sealed envelope and clearly marked as such. Copies must be securely bound (e.g. 3-ring binder, comb binding spine – no binder clips or paper clips please).
- Some sections require appended material. All forms should be completed in full.

EVALUATION OF PROPOSALS

Proposals will be evaluated on the basis of the quality of the proposal, congruence with the goals of this RFP, past program performance, geographic distribution of services, and service to the target population. Point values are allocated to each section of the proposal narrative as follows:

Proposal Summary	5 points
Agency Background and Organizational Capacity	15 points
Target Population	10 points
Program Design	30 points
Staffing	10 points
Outcomes	15 points
Sustainability Plan	5 points
Budget and Budget Narrative	10 points

These values are an evaluation tool; they do not dictate which proposals are ultimately recommended for funding. JCS reserves the right to reject any and all proposals, to waive or modify any requirement contained in this RFP, to amend without consult any proposal, and to effect any agreement deemed to be in the best interest of the city and its residents.

VI. Proposal Checklist

Proposals should follow, in order, the outline below. Sign originals in blue ink.

Submit:

- *one (1) set of loose originals of checklist items 1-16* in an envelope, and
- *six (6) bound copies of checklist items 1-12 only.*

1. **Proposal Cover Sheet** – *appendix D*

2. **Narrative Submission** – This section has a 15-page limit.

- Proposal Summary
- Agency Background and Organizational Capacity
- Target Population
- Program Design
- Staffing
- Outcomes
- Sustainability Plan

3. **Program Outcomes** – *appendix E*

Use this worksheet to detail your proposed program's goal, services, outcomes and methods. Outcomes should follow the standardized format described in this RFP. Indicate the number of CDBG beneficiaries you expect to serve and the number you anticipate will achieve each outcome.

4. **One-Page visual depiction of your economic opportunity continuum service model**

5. **Signed Memorandum of Agreement(s) / Letter(s) of Support** (for collaborations requesting funding for more than one agency or programs working in collaboration with employers or other entities). MoA/Letter of Support must be signed by the CEO of each organization or a designee who has senior operational authority.

6. **Applicant Agency's Organizational Chart**

7. **Participant Grievance Procedure**

8. **Budget Forms and Budget Narrative** – *appendix F*

Develop a budget for the amount of CDBG funds you are requesting. Refer to the budget instructions page for details on how to complete each worksheet.

Budget cover page: requires original signature of person who prepared the budget

Budget cost detail page: Totals should match throughout your budget forms. Formulas have been included to calculate totals automatically.

Budget narrative: Detail CDBG program costs following guidelines for each section on the budget instructions page.

9. **Federally-approved indirect cost letter**, if applicable

10. **Job Description(s) & Resume(s):** submit for staff funded through CDBG only. Please indicate the person's name on each job description and the job title on each resume. Job titles should match those listed on the Budget Cost Detail Page.

- 11. List of all Current Grants and Contracts for the Proposed Services
- 12. List of Current Agency's Board of Directors (showing addresses, affiliations, etc.)
- 13. Certificate of Authority (CM-06) – appendix G
The CM-06 asks you to list the name of the designated authorized signatory for the CDBG-funded program twice, on the top and bottom sections of the form. However, the CM-06 should NOT be signed by the authorized signatory. Please submit with the original signature of the agency's clerk/secretary.
- 14. Wage Theft Prevention Form (CM-16) – appendix H
Select box 1 or 2, as applicable, and submit with the original signature of authorized signatory.
- 15. Provide the D-U-N-S Number for Applicant Agency
Request/verify your DUNS number at: mycredit.dnb.com/duns-lookup/
Enter the agency's name, address, or phone number. If there is a DUNS number that matches the information you entered, a list of agency name options pops up. Click on '**send DUNS #**' next to the agency name you want. Enter your name and email to receive the DUNS information directly to your email. Include the DUNS number in the proposal cover sheet.
- 16. Most Recent CPA-Audited Financial Statement, with all related documents

Proposals will be considered complete with checklist items 1-16.

We are including checklist items 17-24 to expedite the contract execution process, should your proposal get funded. However, completion of these additional forms will not be part of the proposal evaluation and there is no penalty for submitting the proposal without them. Please submit along with the set of loose originals of items 1-16 in a clearly-labeled envelope. If you have any questions regarding how to complete these forms please contact Xanty.necoechea@boston.gov

- 17. Scope of Services – appendix I
- 18. Contractor Certification (CM-09) – appendix J
Section (A) on this form should state the name of the program at your agency for which you are contracting with the City of Boston. Please submit the CM-09 with the original signature of authorized signatory.
- 19. Certificates of Insurance – refer to appendix K
Please submit insurance policies that extend at least **three** months post-proposal due date. The Certificate Holder box should indicate: *EDIC/JCS, 43 Hawkins Street, Boston, MA 02114*
 - General Liability
 - Workers' Compensation
- 20. CORI Forms – appendix L
 - CORI Form A

The CORI form refers to agency guidelines regarding employees, not program participants. Please submit CORI form 15A with the original signature of authorized signatory.

CORI Form B

Submitting this form indicates you've read and understand the City of Boston's CORI guidelines.

CORI Form C

If vendor checks #3 in CORI Form 15A, vendor must submit a copy of its own CORI guidelines on CORI form 15C.

21. Living Wage Form(s) – appendix M

2015 LW-8

The Living Wage forms indicate the current FY15 rate, \$13.89. This rate is subject to an annual adjustment on July 1, 2015. The start date of contract is 7/1/15 and the end date of contract is 6/30/16. The form should indicate a 1-year length of contract. All agencies are required to submit an LW-8. Please submit the LW-8 with the original signature of authorized signatory.

2015 LW-2 (if applicable, see below)

Agencies who employ 25 or more FTE's also need to submit the FY15 LW-2. Form LW-1 has instructions on how to calculate full-time equivalents for your agency. Please submit the LW-2 with the original signature of authorized signatory.

2015 LW-1

Submitting this form indicates you've read and understand the city's Living Wage guidelines.

22. Certificate of Debarment/Lobbying – appendix N

Submit with the original signature of authorized signatory.

23. Verification of 501(c) (3) status

24. Register in the System for Award Management

Register for the first time or update your annual registration. You may check on the status of your registration at any time by logging into www.sam.gov and clicking on your Entity Record page.

Appendices

- A. Letter of Intent to Bid
- B. HUD Income Guideline
- C. Economic Opportunity Model
- D. Proposal Cover Sheet
- E. Program Outcomes
- F. Budget Forms
- G. Certificate of Authority (CM-06)
- H. Wage Theft Prevention Form (CM-16)
- I. Scope of Services
- J. Contractor Certification Form (CM-09)
- K. Insurance Provisions
- L. CORI Forms
- M. Living Wage Forms
- N. Certificate of Debarment/Lobbying

**Appendix A
LETTER OF INTENT TO BID**

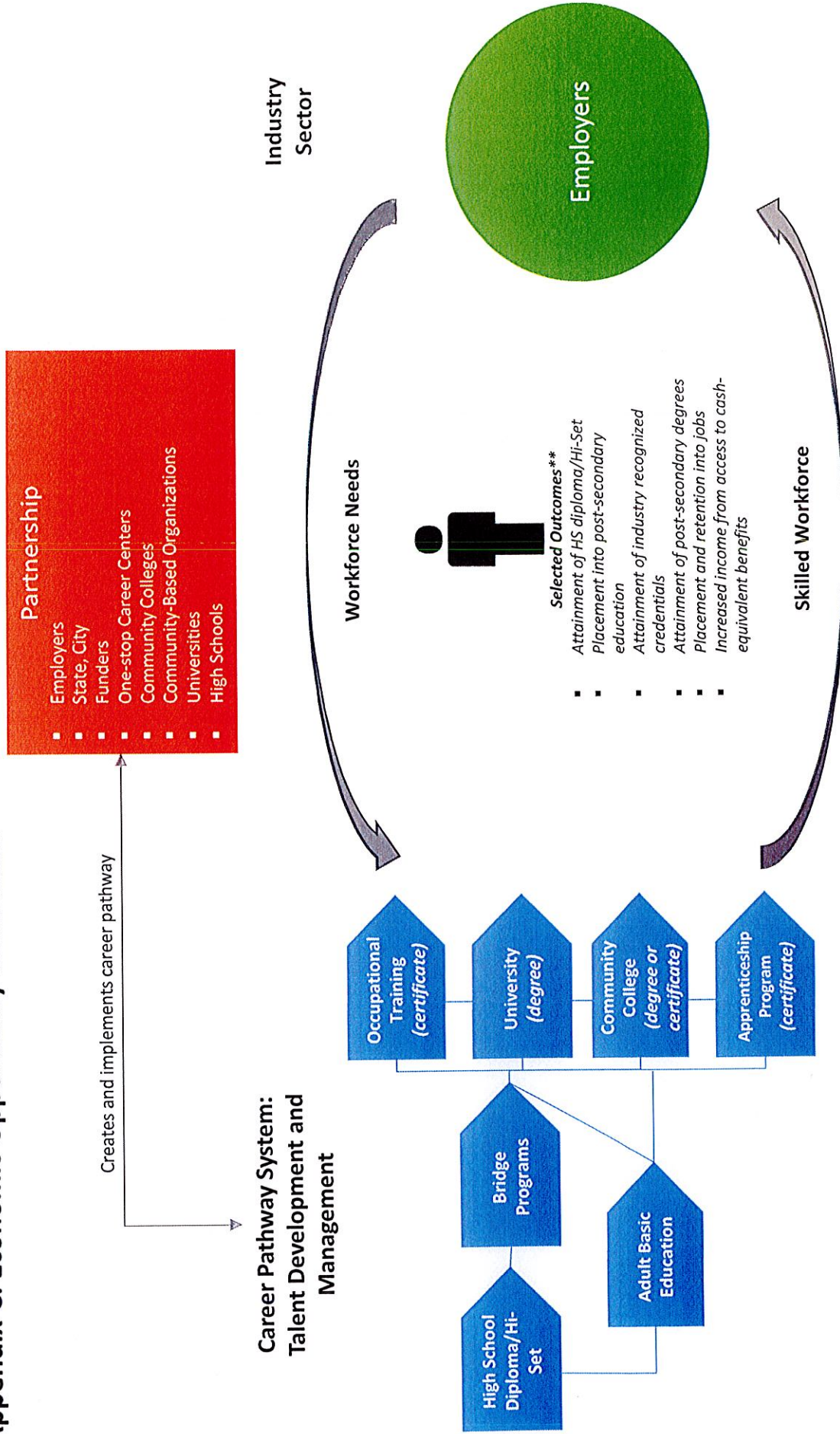
If you intent to submit a proposal for this RFP, please notify JCS of such intent. Please complete the information below and return this form via e-mail to cindy.chow@boston.gov by **March 6, 2015 at 5:00 PM EST**. A letter of intent is required by JCS in order for you to submit a proposal. Should you subsequently decide not to submit, please let us know via email to Cindy Chow. All applicants will receive email confirmation upon receipt.

Name of Organization	
Organization Address, City, and Zip	
Executive Director	
Contact Person	Contact Person Title
Contact Phone Number	Contact E-Mail Address
Type of Service (please describe in 2-3 sentences)	

Appendix B
HUD Income Guideline

<i>Household Size</i>	<i>80% of median</i>	<i>50% of median</i>	<i>30% of median</i>
<i>1 Person</i>	\$47,450	\$32,950	\$19,800
<i>2 Persons</i>	\$54,200	\$37,650	\$22,600
<i>3 Persons</i>	\$61,000	\$42,350	\$25,450
<i>4 Persons</i>	\$67,750	\$47,050	\$28,250
<i>5 Persons</i>	\$73,200	\$50,850	\$30,550
<i>6 Persons</i>	\$78,600	\$54,600	\$32,800
<i>7 Persons</i>	\$84,050	\$58,350	\$35,050
<i>8 Persons or more</i>	\$89,450	\$62,150	\$37,300

Appendix C: Economic Opportunity Continuum



- Partnership**
- Employers
 - State, City
 - Funders
 - One-stop Career Centers
 - Community Colleges
 - Community-Based Organizations
 - Universities
 - High Schools

**Career Pathway System:
Talent Development and
Management**

Creates and implements career pathway

Workforce Needs



Selected Outcomes**

- Attainment of HS diploma/Hi-Set
- Placement into post-secondary education
- Attainment of industry recognized credentials
- Attainment of post-secondary degrees
- Placement and retention into jobs
- Increased income from access to cash-equivalent benefits

Skilled Workforce

Employers

**Industry
Sector**

Economic Security: Income Maximization and Wrap-Around Services*

*For certain populations, such as seniors and individuals with disabilities, emphasis will be placed on economic security component that allow them to retain their current employment and/or allow them to lead stable lives.
 **Includes some examples of outcomes. The list is non-exhaustive.
 Developed by JCS. References: <http://www.dol.gov/NationalDialogue/ColoradoCareerPathwaysGuide.pdf> & <http://www1.nyc.gov/assets/careerpathways/downloads/pdf/career-pathways-full-report.pdf>

**Appendix D
Proposal Cover Sheet**

Please complete the form below. The cover sheet should not exceed 2 pages.

ORGANIZATION PROFILE		
Name of Applicant Organization		
DUNS Number		
Organization's Address, City, and Zip Code		
Name of Program		
Proposed Neighborhood of Service Delivery		
Executive Director's Name		
Name and title of primary contact for the grant		
E-mail address and phone number of primary contact for the grant		
Total organizational budget	\$	
PROGRAM SUMMARY		
Total CDBG-PS Funds Requested: \$	Funding from Other Sources: \$	Total Program Cost: \$
Total number of <u>CDBG</u> participants to be served:	Select which component(s) of the continuum your program provides: <input type="checkbox"/> Employment <input type="checkbox"/> Education <input type="checkbox"/> Economic Security	
Target population and age range:		
Anticipated Outcome(s): <i>List up to 3 major outcomes for your program in number and percentage.</i>	<ul style="list-style-type: none"> ▪ ▪ ▪ 	
Neighborhood(s) the majority of participants will come from:		
<input type="checkbox"/> Allston/Brighton <input type="checkbox"/> Back Bay/Beacon Hill <input type="checkbox"/> Charlestown <input type="checkbox"/> Chinatown <input type="checkbox"/> Downtown <input type="checkbox"/> Dorchester	<input type="checkbox"/> East Boston <input type="checkbox"/> Fenway-Kenmore <input type="checkbox"/> Hyde Park <input type="checkbox"/> Jamaica Plain <input type="checkbox"/> Mattapan <input type="checkbox"/> North End	<input type="checkbox"/> Roslindale <input type="checkbox"/> Roxbury/Mission Hill <input type="checkbox"/> South Boston <input type="checkbox"/> South End <input type="checkbox"/> West End <input type="checkbox"/> West Roxbury
PARTNERS (add rows as needed)		
Type/Role of Partner (e.g. Employer)	Organization Name	Contact Name

INSTRUCTIONS FOR BUDGET AND BUDGET NARRATIVE

BUDGET PAGE 1: (Budget Cover Page) Type your Contractor and Program Name. This information will automatically copy to page 2 and to the budget narrative. Indicate the total number of participants to be served during the fiscal year. The Current Budget Amount totals on page 1 will be automatically entered when you complete the Cost Detail Page. Leave the Revised Budget Amount and Increase/Decrease Amount columns blank (these are used for budget revisions later in the year). For the Monthly Expenditure Plan table provide projected amounts making sure the grand total matches the Cost Detail Page total. Submit the contract budget with an original signature under the 'prepared by' section only.

BUDGET PAGE 2 (Cost Detail Page) and BUDGET NARRATIVE: You must submit a budget narrative/justification for all planned expenditures for each of the budget items listed on the Cost Detail Page. Please do not round totals up or down. The following guidelines can be used for preparing the narrative. It is perhaps the single most important element of your budget. The more detail you provide, the easier it will be for the fiscal reviewers.

- 1. Personnel** - For every position listed under this section, please attach a job description, resume, a brief description of his/her role in the proposed program, the number of pay periods (hourly, weekly, bi-weekly, bi-monthly, etc.) the position requires, and the percentage charged to this funding source. *The type of pay period listed must match your agency's payroll system and supporting documentation.* Please indicate the person's name on each job description. Job titles should match those listed on the Cost Detail Page.
- 2. Fringe Benefits** - In the narrative, list each component included in the fringe benefits rate. Indicate the percentage for each component. Examples of components are FICA, Medicare, Unemployment, Health Insurance, Retirement, etc. (For example: 21.5% fringe rate in cost detail page broken down in narrative as follows: FICA 7.65%, unemployment 1.39%, health insurance 9%, retirement 2%, workers compensation 1.05%, life insurance 0.13% and long term disability 0.28%).
- 3. 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 the period **1/1/15 - 12/31/15** is **57.5** cents per mile. For other travel, particularly if outside the program service area, you must clearly describe the need and cost detail.
- 4. Supplies** - 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, net of applicable credits. Withdrawals from existing inventory should be charged at their actual net cost under any recognized method of pricing inventory. Care should be taken to identify those supplies directly tied to the program.

Program Supplies: What will be purchased, total estimated cost, unit price, quantity? How does it relate to the program?

General Supplies: What will be purchased, total estimated cost, unit price and quantity?

Printing: What will be printed? How many and for what cost?

Postage: What and how many will be mailed at what cost?

Office Supplies: What items will be purchased, why? Total estimated cost, unit cost, quantity, connection 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 GRANT. 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.

5. 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.

6. 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:

Rent: How was the rent cost determined, i.e., square footage, proportionate to the amount of space occupied by program, etc.?

Utilities: How were the utility costs estimated, i.e., square footage, proportionate to the amount of space used by the program, etc.?

Security: What type of security is being purchased, for how long, for what program activities?

Maintenance: How was the cost determined, i.e., square footage, proportionate to the amount of space used by the program, etc.?

Insurance: What kind of insurance, at what cost, for what period, covering what activities?

Miscellaneous: What, why, and at what cost?

6a. 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, in part, or not at all depending on the procurement, source of funds and agency involved. Recognizing that not all agencies, particularly smaller ones, 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, or as specifically allowed by the funding source.

**EDIC / BOSTON
CONTRACTOR'S PROGRAM BUDGET**

CONTRACTOR: agency name
PROGRAM: program name

Funding Source: CDBG
Contract Period: 7/1/15 - 6/30/16

TOTAL NUMBER OF PARTICIPANTS TO BE SERVED: _____

DESCRIPTION	CURRENT BUDGET AMOUNT	REVISED BUDGET AMOUNT	INCREASE / DECREASE AMOUNT
I. CDBG PROGRAM			
1. Personnel	\$0.00		
2. Fringe Benefits	\$0.00		
3. Travel	\$0.00		
4. Supplies	\$0.00		
5. Contractual	\$0.00		
6. Other	\$0.00		
6a. Indirect	\$0.00		
TOTAL	\$0.00	\$0.00	\$0.00

MONTHLY EXPENDITURE PLAN

MONTH	CDBG PROGRAM
JULY 2015	\$0.00
AUGUST	\$0.00
SEPTEMBER	\$0.00
OCTOBER	\$0.00
NOVEMBER	\$0.00
DECEMBER	\$0.00
JANUARY 2016	\$0.00
FEBRUARY	\$0.00
MARCH	\$0.00
APRIL	\$0.00
MAY	\$0.00
JUNE	\$0.00
TOTAL	\$0.00

CONTRACTOR SIGNATURE:

Prepared by: _____
Name Date

Approved by: _____
(EDIC use only) Name Date

CDBG PROGRAM: Cost Detail

CONTRACTOR: agency name
 PROGRAM: program name

FUNDING SOURCE: CDBG
 CONTRACT PERIOD: 7/1/15 - 6/30/16

1. PERSONNEL

(a) #	Position Title / Staff name or initials	(b) Salary per Pay Period or hourly rate	(c) # of Pay Periods or hours	(d) % Charged to EDIC/Grant	(a)*(b)*(c)*(d) EDIC/Grant Total
1	job title & staff initials	\$0.00	0.00	0.00%	\$0.00
1	job title & staff initials	\$0.00	0.00	0.00%	\$0.00
1	job title & staff initials	\$0.00	0.00	0.00%	\$0.00
TOTAL PERSONNEL					\$0.00

2. FRINGE BENEFITS	Rate	0.00%	\$0.00
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OPERATIONAL COSTS		
3. TRAVEL		\$0.00
4. SUPPLIES		\$0.00
5. CONTRACTUAL		\$0.00
6. OTHER		\$0.00
6A. INDIRECT	\$0.00 Rate: 0.00%	\$0.00
SUBTOTAL OPERATIONAL COSTS		\$0.00
TOTAL: CDBG PROGRAM		\$0.00

In order to assist you in calculating totals, formulas have been added to this page in various cells. Each category total will automatically be reflected on the Current Budget Amount column on the first budget page.

You will have to enter projected monthly expenditures on page 1, but it will total the amount for you.

BUDGET NARRATIVE

FUNDING SOURCE: CDBG

CONTRACT PERIOD: 7/1/15 - 6/30/16

agency name

program name

PERSONNEL

Job Title - Staff Name

\$0.00

pay periods/hours at \$ rate per pay period/hour @ % to EDIC/CDBG

Indicate if the position is full-time or part-time, salaried or hourly rate, paid weekly, bi-weekly, or monthly. Provide summary of CDBG job responsibilities for this position. Attach job description & resume.

Job Title - Staff Name

\$0.00

pay periods at \$ rate per pay period @ % to EDIC/CDBG

Indicate if the position is full-time or part-time, salaried or hourly rate, paid weekly, bi-weekly, or monthly. Provide summary of CDBG job responsibilities for this position. Attach job description & resume.

Job Title - Staff Name

\$0.00

pay periods at \$ rate per pay period @ % to EDIC/CDBG

Indicate if the position is full-time or part-time, salaried or hourly rate, paid weekly, bi-weekly, or monthly. Provide summary of CDBG job responsibilities for this position. Attach job description & resume.

FRINGE BENEFITS

\$0.00

Provide fringe benefit rate and breakdown.

TRAVEL

\$0.00

Describe transportation expenses under this line item.

SUPPLIES

\$0.00

Describe items to be purchased under this line item.

CONTRACTUAL

\$0.00

Describe contracted expenses under this line item.

OTHER

\$0.00

Describe other expenses under this line item.

INDIRECT COSTS

\$0.00

Indicate indirect cost rate and attach a copy of federally approved letter of agreement regarding your agency's indirect cost rate.

CDBG TOTAL

\$0.00