

Partnerships for a Skilled Workforce  
420 Lakeside Avenue, Suite 301  
Marlborough, MA 01752

**One-Stop Operator Contract with Career TEAM  
Modification One**

Contract Amount: \$1,997,067

Grants/Programs: WIOA Title I Adult and Dislocated Workers, Wagner-Peyser, One Stop, DVOP, UI Walk-In, RESEA, Trade, and WIOA Partners Interdepartmental Service Agreements with DCS for shared and infrastructure costs.

Contract Period: July 17, 2017 – June 30, 2018. Performance will be reviewed in May and, if performance is acceptable and funds are available, the contract will be extended annually for an additional year up to three additional years.

Cost Reimbursement Contract. Invoices payable monthly with accurate and complete documentation.

Sub-recipient: Career TEAM is a sub-recipient responsible for fulfilling WIOA responsibilities and achieving performance goals.

Contact: Christopher Kuselias, CEO  
Career TEAM  
250 State Street, C2  
North Haven, Connecticut 06473  
[chris@careerteam.com](mailto:chris@careerteam.com)  
203-407-8800

Signatures

Chris Kuselias, CEO, Career TEAM  
Signature \_\_\_\_\_

Date

9/8/17

John J. Carroll, General Manager, Town of Norwood  
WIOA Grant Recipient  
Signature \_\_\_\_\_

Date

9-7-17

Carol Wolf, WIOA Fiscal Agent, ETA, Inc.  
Signature \_\_\_\_\_

Date

9-7-17

Signature \_\_\_\_\_

Date

9-8-17

Mary Feeney, Chair, Partnerships for a Skilled Workforce

Signature \_\_\_\_\_

Date

9-8-17

Sylvia Beville, PSW Executive Director

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Attachments

- A. Proposal Scope of Work Sections
- B. Business Model
- C. Memorandum of Understanding
- D. Career Center Certification Standards, Criteria, Elements and Measures
- E. Contract Terms and Conditions

## **Career TEAM Scope of Work**

### **Proposal**

Sections of the Career TEAM proposal describing the scope of work are incorporated into this contract as Attachment A.

### **Business Model Implementation and Continuous Improvement**

Career TEAM will implement the PSW demand-driven business model in Attachment B. Career TEAM will record the challenges and successes in implementation, refine the model to ensure that employers and individuals receive the most effective and efficient workforce development services, and make recommendations to the PSW Career Center Initiative Board (CCIB).

### **Adult and Dislocated Workers Services**

#### ***Locations***

Career TEAM will select, negotiate lease(s) and provide comprehensive services at one location, and make the necessary arrangements to open up to three auxiliary or affiliated centers in FY18. The opening dates and locations of the comprehensive center and the opening dates and locations of the auxiliary and affiliated centers must be approved by the CCIB.

Locations must be accessible to people with disabilities.

#### ***Services to Individuals***

While it is true that a majority of career center customers in the past have had a bachelor's degree or more, it is the responsibility of the career center to provide services to participants in the Partner's programs that may not be as advantaged. This includes young people with limited or no work experience, people whose first language is not English, immigrants, the disabled, veterans, and people with weak literacy and numeracy skills. Priority must be given to the shared customers as defined in the Memorandum of Agreement among the WIOA Partners. See Attachment C.

The provision of services will be guided by the principles of universal access and customer choice as defined in Title I of the WIOA and by the priority for adult services given to those most in need.

Career TEAM must make available the basic, individualized, training, and labor exchange services listed in Title I, WIOA.

Career TEAM will ensure that the career center and reemployment seminars are held in accordance with USDOL guidelines.

Career TEAM will approve applications from eligible providers and maintain the eligible training providers list.

Career TEAM must ensure that participants enrolled in WIOA or Dislocated Workers activities continue to receive services for up to 12 months after they are employed, if they need post-placement support.

Unless approved by PSW's CCIB, all services must be provided to individuals at no cost.

Services must be available to people with disabilities.

#### ***Employer Services***

Providing qualified applicants is the single most important service Career TEAM and its Partners will deliver to employers.

Career TEAM will implement the Employer Marketplace—specializing in the needs of target markets, developing accounts with firms, and training one-stop and Partner staff to provide talent to employers.

Design, build and populate the employer database on a time schedule so that the first reports are presented to staff and the CCIB in April 2018.

Unless approved by PSW's CCIB, all services must be provided to companies at no cost.

### **WIOA and Community Partners in the Career Centers**

Career TEAM is responsible for operations and will take the lead among WIOA Partners to implement the Memorandum of Understanding attached to this contract as Attachment C—working with the state agencies to utilize existing state job descriptions for work that must be done to implement the PSW business model. The Partners' contributions in the delivery of services and the infrastructure must contribute to the achievement of the Partners' and Career TEAM's goals. Career TEAM will produce an organizational chart with the WIOA Partners, delineating the functions of each in the delivery of services to individuals and employers through the career centers as the interagency agreements are fully executed.

PSW staff will continue to facilitate the policy discussion among the WIOA Partners to refine the MOA to meet the evolving needs of individuals and companies.

### **Performance Measures**

In FY18, the baseline for measuring performance will be established during the period October 2, 2017 to June 30, 2018.

Career TEAM will provide services to:

- 9,000 individuals. 1,250 will receive face-to-face services at 1671 Worcester Road and the affiliated and auxillary centers. (Adults and dislocated workers are included in the total receiving face-to-face services.) The remainder will receive services through the on-line portal.
- 85 adults. 35 will complete their service plans and 30 or 86% will be placed in a job. 51 individuals will enroll in training.
- 450 dislocated workers. 350 will complete and 86% or 300 will be placed in a job. 219 will enroll in training.

Career TEAM will provide services to 678 employers. 500 will list job orders and 472 will receive referrals from the career center.

Career TEAM will produce reports on a schedule and in a format supplied by PSW. PSW staff will conduct on-site performance reviews each quarter, beginning in December 2017.

### **Marketing**

Career TEAM will develop and implement a marketing plan by September 30, 2017, including but not limited to, media communications and site visits and presentations to public and community organizations, business associations, municipal officials state legislators and congressional staff. The plan will incorporate the state one-stop marketing plan.

Career TEAM must notify PSW before any communications with the media take place.

All print materials must contain the language, "An initiative of Partnerships for a Skilled Workforce funded with Workforce Innovations and Opportunity Act funds."

## Revenue

Career TEAM is encouraged to leverage USDOL and state one-stop funding to bring additional revenue to the center and will submit a plan to the CCIB at the first meeting in calendar year 2018 (January or February). The grant recipient or administrator will be PSW with Career TEAM responsible for operations and goal attainment. Five percent of each new contract, grant or donation raised by Career TEAM with career center WIOA funding will be budgeted to cover PSW's costs of project administration and oversight.

## Compliance

The design, operations, standards and outcomes for services at the career centers must meet the requirements of the Workforce Innovation and Opportunity Act and the regulations and guidelines issued by the US Departments of Labor and Education and the Massachusetts Executive Office of Labor and Workforce Development. Career TEAM must have systems in place to ensure that all staff understand and comply with the requirements.

Career TEAM must comply with the requirements of the Federal Register, December 26, 2013, Part III, Office of Management and Budget, 2 CFR Chapter I, Chapter II, Part 200, et al. Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards; Final Rule.

The Massachusetts Workforce Investment Board has established standards that all career centers must meet in order to be certified as one-stop operators. The categories of standards include cost effectiveness, integrated services, federal and local performance, demand driven model, maximizing access for job seekers and business, and effective leadership and management. The matrix is Appendix D.

Career TEAM will:

- Determine eligibility for WIOA Adult and Dislocated Worker Services and for any other programs Career TEAM administers. (The Partners are responsible for determining eligibility for their programs.)
- Collect a profile from each career center user to be used to match the individual with jobs.
- Maintain participant and employer records following guidelines from the Department of Career Services.
- Arrange for MOSES training for staff and comply with the requirements for data entry in MOSES.

All adults and dislocated workers must be eligible for services. Their eligibility must be fully documented in MOSES in a timely and accurate manner. Participant and employer data must be collected, entered and maintained in MOSES in accordance with Massachusetts Department of Career Services requirements and retained in folders accessible to monitors. Any disallowed costs resulting from failure to meet eligibility requirements and/or to provide proper documentation will be paid by Career TEAM with non-federal or state funds.

## Accountability

Career TEAM is accountable to PSW for performance.

Career TEAM will participate in the development of an evaluation design to be implemented during the second full year of operations when the career center is fully functional.

Using a format provided by PSW, Career TEAM will produce:

- Monthly performance reports for PSW staff and the CCIB due the 15<sup>th</sup> of each month for the prior month.
- Monthly invoices using the PSW format with documentation of expenses due the 15<sup>th</sup> day of each month for the prior month. The fiscal agent will pay within 30 days of receipt of a complete and accurate invoice.

### Deliverables

On a schedule agreed to by PSW and Career TEAM, Career TEAM will design, implement and produce the following reports to the CCIB:

- A work plan with deadlines for each major activity.
- A system for capturing successes and challenges in implementing the Business Model, including data to be collected and the method(s) for collecting, analyzing and reporting data.
- A staffing plan and organizational chart, including the WIOA Partners.
- A marketing plan to be implemented in the second quarter of the fiscal year.
- A funds development plan.
- An employer customer management system, engaging the WIOA Partners in the design, collection and entry of data, and production of reports.

Career TEAM will submit monthly program reports and invoices by the 15<sup>th</sup> of each month in a format provided by PSW.

LINE ITEM	Narrative Description of use of funds	Amount
PREMISES LEASE	Costs are listed in accordance with sq ft allocation based on square footage use in FY17- allocation spreadsheets attached.	\$ 267,400.00
1071 Lease	Rent for approximately 7,500 sq ft of office space at an equivalent rate of approximately \$18.66/sq ft for year one for the comprehensive career center site, to include security deposit (2 Months) and all associated lease costs. Costs are listed in accordance with sq ft allocation based on square footage use in FY17- allocation spreadsheets attached.	\$ 140,000.00
1071 Build out	Bulk out of a wall to reduce space to 7500 sq ft	\$ 30,000.00
UTILITIES	Career TEAM has budgeted utilities costs based on the amount consumed in our similar sized programs	\$ 10,000.00
32 Day St Operating Costs	32 Day St Utilities Costs	\$ 10,000.00
	32 Day St / Lease Expenses (Based on \$17/sq ft for ~3100 sq ft) for year one for the career center site, to include security deposit (2 Months) and all associated lease costs.	\$ 47,400.00
	\$30,000 for 32 Day St build out adjusted to account for possible ADA Compliance issues	\$ 30,000.00
MOSES FEE	N/A	
INFORMATION TECHNOLOGY (IT/DATA LINES)	Costs are listed in accordance with sq ft allocation based on square footage use in FY17- allocation spreadsheets attached.	\$ 191,000.00
Internet Service / Communications	Comprehensive Site Internet and phone connectivity	\$ 10,000.00
Software Purchase & Maintenance	Additional funds of \$25,000.00 will be allocated to functional licenses for computer use such as Microsoft Office, Windows OS, etc.	\$ 25,000.00
Software Purchase & Maintenance	There will be \$ 150,000.00 costed out in total for use, access and updates for Career EDGE product :	\$ 150,000.00
Satellite Site	Satellite Site Communications & Internet Access	\$ 6,000.00
NON PERSONNEL SERVICES - OTHER	Costs are listed in accordance with sq ft allocation based on square footage use in FY17- allocation spreadsheets attached.	\$ 129,306.14
Duplicating and printing	Career TEAM has budgeted duplication and printing costs based on the amount consumed in our similar sized programs	\$ 10,000.00
Advertising	Career TEAM will utilize this line item to generate interest in the community and promote job fairs and trainings.	\$ 15,000.00
Supplies	After reviewing the number of clients to be served, and the needs of similar programs, Career TEAM has determined the program will require supplies for two sites. The majority of the supply budget will cover paper costs for lab and staff use.	\$ 14,000.00
Postage	Pro-rated cost of postage expenses and USPS mailings	\$ 5,000.00
Memberships	Career Team has budgeted over \$1,000 for membership fees. This includes local chambers, recruiting groups, Human Resource Associations and online memberships which incur a cost such as LinkedIn.	\$ 1,000.00
Equipment purchase	Career TEAM has a lower budget for computers based on inventory of current resources and equipment.	\$ 20,000.00
Equipment rent and repair	Career TEAM has shifted funds into the rental and repair category to cover the cost of monthly leases for a multifunction copier/printer.	\$ 12,000.00
MOVING COSTS	CareerTEAM has additionally allotted funds toward potential moving costs to populate the Auxiliary sites	\$ 20,177.35
Meeting Expenses	Space rental expenses associated with holding annual events for the employer and community partners : Employer Events (4x500) Partner Hiring Events (4x500) Partner Meetings (4x300) Job Fairs (Booth Purchase) (4x200)	\$ 8,000.00
Travel	Travel between the hub office and satellite offices, particularly the Project Assistant, trainers and the Job Developer professionals. Cost of travel for round trips to Nonwood facilities (31 miles) and employers in the surrounding areas (average 20 miles a trip) to support project implementation for the contract term; 31,720 miles/year at \$0.54/mile.	\$ 17,128.79
INDIRECT / DEMINIMUS		\$ 106,333.36
	DEMINIMUS MTDC	\$ 106,333.36
SUPPORT SERVICES		\$ 34,737.00
	The amount of \$34,737.00 will be used for supportive services to ensure training completion.	\$ 34,737.00
TRAINING		\$ 423,263.00
Training	Career TEAM has budgeted for ITA training at an ITA threshold for FY'18 is \$8,000 per Adult and DW or approximately 45 Individuals depending on individual ITA amounts	\$ 373,263.00
	Career TEAM has budgeted for Credential Budget at a Credential cost threshold for FY'18 is \$250 per Adult and DW or 140 Individuals	\$ 50,000.00

TOTAL SALARY AND FRINGE		\$ 845,927.50
Sub-Total Direct Costs	PERSONNEL, Utilities, 32 Day St Utilities Costs, Comprehensive Site Internet and phone connectivity, Satellite Site Communications & Internet Access, Duplicating and printing, Advertising, Supplies, Postage, Memberships, MOVING COSTS, Meeting Expenses, Travel, 1071 Build out Bulk out of a wall to reduce space to 7500 sq ft, \$30,000 for 32 Day St build out adjusted to account for possible ADA Compliance issues	\$ 1,063,333.64
Sub-Total Indirect Costs	Equipment rent and repair, Equipment purchase, TRAINING & SUPPORT SERVICES, Software Purchase & Maintenance, 1071 Lease, 32 Day St / Lease Expenses (Based on \$17/sq ft for ~3100 sq ft) for year one for the career center site, to include security deposit (2 Months) and all associated lease costs.	\$ 827,400.00
Total Funds		\$ 1,997,067.00
ORIGINAL ALLOWED FUNDS		\$ 1,997,067.00
	ORIGINAL DELTA	\$ (0.00)

MTDC CALC	MTDC	\$ 1,063,333.64
	INDIRECT COSTS RATE	MTDC % 10% \$ 106,333.38
	TOTAL NON DIRECT COST (LEASES, BUILD OUT, IT)	\$ 827,400.00
	TOTAL	\$ 1,997,067.00
	DELTA	\$ (0.00)

Position Title	# of positions	Narrative Description of use of funds	Hourly Rate	Total Cost wks x hrs x rate	Actual Total Costs
Project Manager	1.00	<ul style="list-style-type: none"> <li>Jason Matthews - (\$110,000 base) beginning July 17th, 2017. The calculation is based on 1 FTE for a duration of 50 weeks and are directly allocated across the funding source as follows:</li> <li>The person or person in this position will be charged 40% State One Stop, 25% to WIOA Adult, 35% to Adult dislocated. This is based upon the number of people that were served in WIOA Adult or Dislocated Worker and Wagner Payser in FY17. Because career centers are held to universal service standards; there are large numbers of people who must be served who cannot be enrolled in Adult or Dislocated Worker, or intensive training programs due to funding limitations. Staff time is charged to the state one stop to provide for those services. This time allocation will be reflected in this person's time sheets.</li> <li>Duties</li> <li>Responsible for managing and supervising staff, and overseeing the administration programs, coordinating service delivery in a multi-center area.</li> <li>Coordinate the service delivery one-stop partners across one stop delivery system.</li> <li>Implement the Online Learning Center (OLC) service delivery model</li> <li>Hybrid leadership and direct service position to Align Workforce Development Programs, engage with a diverse range of employers and other entities in the region to increase job orders and placement of job seekers</li> </ul>	\$ 52.88	\$ 105,769.23	\$ 105,769.23
Career Center Navigator II	1.00	<ul style="list-style-type: none"> <li>Career Navigator II (\$80,000 base) beginning July 21st, 2017 and September 1st, 2017. The calculation is based on 1 FTE for a duration of 43 weeks for and 48 weeks and are directly allocated across the funding source as follows:</li> <li>The person or person in this position will be charged 40% State One Stop, 25% to WIOA Adult, 35% to Adult dislocated. This is based upon the number of people that were served in WIOA Adult or Dislocated Worker and Wagner Payser in FY17. Because career centers are held to universal service standards; there are large numbers of people who must be served who cannot be enrolled in Adult or Dislocated Worker, or intensive training programs due to funding limitations. Staff time is charged to the state one stop to provide for those services. This time allocation will be reflected in this person's time sheets.</li> <li>Duties</li> <li>Providing on-site engagement of partners at affiliate locations and ensuring shared customers receive services</li> <li>Working directly with employers on-site at the One-Stop Career Center (OSCC) to offer in person employer connections to job seekers such as recruitment events</li> <li>The Career Center Navigator will verify that customers are directed to training programs that are aligned with their employment goals. The priority is to enroll customers in training related to in-demand industries and occupations.</li> </ul>	\$ 38.46	\$ 73,846.15	\$ 73,846.15
Career Center Navigator II	1.00	<ul style="list-style-type: none"> <li>Career Navigator II (\$80,000 base) beginning July 21st, 2017 and September 1st, 2017. The calculation is based on 1 FTE for a duration of 43 weeks for and 48 weeks and are directly allocated across the funding source as follows:</li> <li>The person or person in this position will be charged 40% State One Stop, 25% to WIOA Adult, 35% to Adult dislocated. This is based upon the number of people that were served in WIOA Adult or Dislocated Worker and Wagner Payser in FY17. Because career centers are held to universal service standards; there are large numbers of people who must be served who cannot be enrolled in Adult or Dislocated Worker, or intensive training programs due to funding limitations. Staff time is charged to the state one stop to provide for those services. This time allocation will be reflected in this person's time sheets.</li> <li>Duties</li> <li>Providing on-site engagement of partners at affiliate locations and ensuring shared customers receive services</li> <li>Working directly with employers on-site at the One-Stop Career Center (OSCC) to offer in person employer connections to job seekers such as recruitment events</li> <li>The Career Center Navigator will verify that customers are directed to training programs that are aligned with their employment goals. The priority is to enroll customers in training related to in-demand industries and occupations.</li> </ul>	\$ 38.46	\$ 66,153.85	\$ 66,153.85
Career Center Navigator	2.00	<ul style="list-style-type: none"> <li>Career Center Navigator (\$50,000 base) beginning September 4th 2017. The calculation is based</li> <li>The person or persons in this position will be charged 50% to WIOA Adult, 40% to Adult dislocated, 5% to RESEA and 5% to Trade. This is based upon the Coach's work assignment to WIOA Adult and Dislocated Workers as well as a smaller portion of their time towards RESEA and Trade. This time allocation will be reflected in this person's time sheets.</li> <li>Duties</li> <li>The Career Center Navigator will provide supported services to customers enrolled in a certification or credential. The Navigator will provide case management support during intake, enrollment and during the training course.</li> <li>The Career Center Navigator will verify that customers are directed to training programs that are aligned with their employment goals. The priority is to enroll customers in training related to in-demand industries and occupations.</li> </ul>	\$ 24.04	\$ 41,346.15	\$ 82,692.31
IT Technical	1.00	<ul style="list-style-type: none"> <li>Will B. (\$70,000) beginning September 4th 2017. The calculation is based on 1 FTE for a duration of 43 weeks and is directly allocated across the funding source as follows:</li> <li>The person or person in this position will be charged 40% State One Stop, 25% to WIOA Adult, 35% to Adult dislocated. This is based upon the number of people that were served in WIOA Adult or Dislocated Worker and Wagner Payser in FY17. Because career centers are held to universal service standards; there are large numbers of people who must be served who cannot be enrolled in Adult or Dislocated Worker, or intensive training programs due to funding limitations. Staff time is charged to the state one stop to provide for those services. This time allocation will be reflected in this person's time sheets.</li> <li>Duties</li> <li>Design, build and maintain computer and server networks for career center and affiliate sites specifically identified with the project</li> <li>Repair technical issues that arise in the center and replace physical equipment as needed.</li> <li>Monitor the network and computer connection.</li> <li>Clean computers; renew software; maintain licenses contracts in support of shared customers which are integral to the project or activities within.</li> </ul>	\$ 33.65	\$ 57,884.62	\$ 57,884.62
IT Technical QA Assistant	1.00	<ul style="list-style-type: none"> <li>Rory M. (\$55,000 base) beginning September 4th, 2017. The calculation is based on 1 FTE for a duration of 43 weeks and is directly allocated across the funding source as follows:</li> <li>The person or person in this position will be charged 40% State One Stop, 25% to WIOA Adult, 35% to Adult dislocated. This is based upon the number of people that were served in WIOA Adult or Dislocated Worker and Wagner Payser in FY17. Because career centers are held to universal service standards; there are large numbers of people who must be served who cannot be enrolled in Adult or Dislocated Worker, or intensive training programs due to funding limitations. Staff time is charged to the state one stop to provide for those services. This time allocation will be reflected in this person's time sheets.</li> <li>Duties</li> <li>Provides quality assurance through data reporting, report creation and state database analysis for all activities within career center and affiliate sites specifically identified with the project to ensure shared customers receive all benefits and services</li> <li>Skilled in Data warehouse, SQL and oracle systems.</li> </ul>	\$ 26.44	\$ 45,480.77	\$ 45,480.77
Career Coach	1.00	<ul style="list-style-type: none"> <li>Career Coach (\$70,000 base) beginning September 4th, 2017. The calculation is based on 1 FTE for a duration of 43 allocated across the funding source as follows:</li> <li>The person or person in this position will be charged 50% to WIOA Adult, 40% to Adult dislocated, 5% to RESEA and 5% to Trade. This is based upon the Coach's work assignment to WIOA Adult and Dislocated Workers as well as a smaller portion of their time towards RESEA and Trade. This time allocation will be reflected in this person's time sheets.</li> <li>Duties</li> <li>The Coach will be an Online Learning Facilitator providing services to shared customers.</li> <li>The Coach will assist in identifying ITA options available to eligible and appropriate participants</li> <li>The Coach helps career center and partner job seekers acquire industry-recognized credentials for in-demand jobs.</li> <li>The Coach will use career pathways to provide education and employment and training assistance to accelerate job seekers' educational and career advancement.</li> </ul>	\$ 33.65	\$ 57,884.62	\$ 57,884.62



Job Developer	1.00	<ul style="list-style-type: none"> <li>• Job Developer (\$70,000 base) beginning September 4th, 2017. The calculation is based on 1 FTE for a duration of 43 allocated across the funding source as follows:</li> <li>• The person or person in this position will be charged 50% to WIOA Adult, 40% to Adult dislocated, 5% to RESEA and 5% to Trade. This is based upon the Coach's work assignment to WIOA Adult and Dislocated Workers as well as a smaller portion of their time towards RESEA and Trade. This time allocation will be reflected in this person's time sheets.</li> <li>• Duties</li> <li>• The Job Developer is responsible for promoting job search participants to the employer community and connecting with employers to obtain job leads to place participants. This includes working closely with the Career Navigators to ensure the service reflects participants' needs, abilities and employment goals.</li> <li>• As well, the Job Developer will coach, support and monitor shared customers post placement and maintain a relationship with the employer.</li> </ul>	\$ 33.65	\$ 57,884.62	\$ 57,884.62
Case Manager	3.00	<ul style="list-style-type: none"> <li>• Case Manager Role (\$70,000 base) beginning September 4th 2017. The calculation is based on 3 FTE for a duration of 43 weeks.</li> <li>• The person or persons in this position will be charged 50% to WIOA Adult, 40% to Adult dislocated, 5% to RESEA and 5% to Trade. This is based upon the Coach's work assignment to WIOA Adult and Dislocated Workers as well as a smaller portion of their time towards RESEA and Trade. This time allocation will be reflected in this person's time sheets.</li> <li>• Duties</li> <li>• The case manager will manage an active caseload for the Adult and WIOA Dislocated Worker programs.</li> <li>• The case manager will maintain accurate written case records and files that are necessary to meet contractual requirements.</li> <li>• The case manager will develop and implement casework service plans for complex cases.</li> <li>• The case manager will assist clients to remove barriers.</li> </ul>	\$ 33.65	\$ 57,884.62	\$ 173,653.85
<b>TOTAL FTE FRINGE</b>	<b>12.00</b>				<b>\$ 721,250.00</b>
<b>TOTAL FTE</b>	<b>12.00</b>				<b>\$ 721,250.00</b>

FRINGE BENEFITS DETAIL

Benefit	Rate	Comment	All Base	Total
FICA	07.550%		721,250	55,176
Workers	01.750%		721,250	12,627
PUTA	05.000%	Calculated on first 57,000	84,000	5,060
SUTA	01.900%	Calculated on first 513,000	180,000	3,420
Health Insurance	133,950.00	5330 per full-time employee per month	12.00	64,020
<b>TOTAL</b>				<b>178,283</b>

TOTAL PERSONNEL	\$ 845,027.50
CALCULATED PERCENTAGE	17%

LINE ITEM	AMOUNT
PERSONNEL	\$ 845,027.50
Salaries and Wages	\$ 721,250.00
Fringe Benefits	\$ 123,777.50
PREMISES LEASE	\$ 287,100.00
Rent / Occupation Expenses	\$ 140,000.00
Build Out ( 2 sites)	\$ 80,000.00
Utilities	\$ 10,000.00
Satellite Site Utilities	\$ 10,000.00
Satellite Site Rent / Occupation Expenses	\$ 47,400.00
MOSES FEE	
INFORMATION TECHNOLOGY (IT-DATA LINES)	\$ 191,900.00
Internet Service / Communications	\$ 10,000.00
Software Purchase/maintenance	\$ 175,000.00
Satellite Site Communications	\$ 6,000.00
NON PERSONNEL SERVICES - OTHER	\$ 129,306.11
Duplicating and printing	\$ 10,000.00
Advertising	\$ 15,000.00
Supplies	\$ 14,000.00
Postage	\$ 5,000.00
Memberships	\$ 1,000.00
Equipment purchase	\$ 20,000.00
Equipment rent and repair	\$ 12,000.00
Moving Expenses	\$ 29,177.35
Meeting Expenses	\$ 6,000.00
Travel	\$ 17,128.79
INDIRECT / DeMinimus	\$ 106,331.36
SUPPORT SERVICES	\$ 34,717.00
TRAINING: 10% Allocation minimum	\$ 123,283.85
Occupational Skills Training	\$ 373,263.00
All Other Training (OJT)	\$ 50,000.00
<b>TOTAL</b>	<b>\$ 1,347,367.10</b>







# Career Center Request for Proposals Partnership for a Skilled Workforce Metro Southwest Massachusetts Scope of Work Sections from the May 30, 2017 Proposal

## Welcome Center: Headquarters

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Please describe and list the services that people will receive at the Welcome Center. What are the needs of the people you will refer to units within the center? What needs will prompt you to refer people to one or more of the Partners in the network?

Career TEAM intends to operate a physical as well as virtual Welcome Center, this will increase the number of potential customers served and provide on demand services 24/7. The physical Welcome Center will provide a warm inviting atmosphere where clients will 1) participate in orientation; 2) enroll for services; 3) receive a basic assessment from staff; 4) register for more intensive services with Career Navigators or the Job Services Suite; 5) receive referrals to community resources. The Virtual Welcome Center will provide all the services of the physical office but will be available on demand 24/7. There will a self-directed menu of "short" how we can help videos, will have a login portal for customers to access their individual accounts (e.g. content, tools, resume, profiles

Customers that are interested in training, certification, ITA grants, direct job referrals or intensive career counseling will be referred to services within the center. Clients that are under 18, have ongoing significant barriers will be referred to appropriate community partners or agencies. Clients with short-term barriers will be provided with a referral, but encouraged to concurrently work toward their career goals. Referrals will be based on the attestation of the customer, observation of staff, and results of assessments.

What knowledge and skills will you require for people staffing the Welcome Center and what professional development will be required so that staff have the skills?

Welcome Center Staff will perform a variety of tasks depending on their role including orientation, eligibility, assessment, and referral to internal and external services. Required skills for these services include the ability to: 1) conduct customer orientation, intake, and eligibility determination; 2) conduct client-tracking functions including timely and accurate data entry of customer information; 3) Provide a basic assessment of customers' skills, aptitudes and barriers using a variety of tools and tests; 4) Become familiar with and refer customers to appropriate community resources; 5) Possess knowledge of the "Workforce Innovations and Opportunity Act" (WIOA) as it pertains to this field; 6) Experience working with target populations (i.e. dislocated workers, low income, disabled, veterans, etc.); 7) Knowledge of computerized tools; e.g., accessing Internet-based job search information; 8) Effective communicator, including written, oral and public speaking for conducting workshops as needed; 9) Creative thinking, problem-solving, & decision-making skills; 10) Minimum of a High School Diploma, Associates or Bachelors preferred; and 11) Preferably bi-lingual English and Spanish, Portuguese, or Haitian Creole.

CTL staff training will include required onboarding seminars (e.g., employee handbook, payroll, sexual harassment policy, health and welfare benefits, and confidentiality). CTL expects our staff to meet or exceed minimum knowledge, skills, and abilities thresholds to perform effectively in a technology rich environment in the context of their position and for specific market segments. Initial training priorities include: technology use, customer service, labor market information, diversity training, motivational interviewing, conflict resolution, and sales. Professional development training should be ongoing (monthly, if not daily) as part of CTL's own "talent

development system”. CTL recommends that training opportunities include staff members from community and agency partners.

### Welcome Center: Auxiliary Centers

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How would you leverage space by working with municipalities, libraries, WIOA Partners, etc. That is, where might you locate the center within a town?

CareerTEAM plans to align area providers and partners in a more tangible way. By aligning all efforts in into one direction we will improve the delivery structure for all employers and job seeker customers. We will achieve this by co-location with Partners and Building an Integrated Service Delivery Toolkit into the MOU. We will embed staff into libraries, community action agencies, and education partners. This use of shared space will be a cost-effective measure which will allow for greater access to our services and technology.

Please list the services that will be available. What are the days and hours of operation?

The proposed model will increase access through the physical and virtual welcome centers as well as through satellite sites operated by partners who receive training from our team. All Auxiliary Welcome Centers will have an Orientation schedule which will be based on demand from the community and the location capacity. On Orientation days’ staff will be available to provide initial assessments, resume review, enrollment and referrals for Career Navigation Services at the main office. Centers will be open to the public based on the co-locations’ available schedule, efforts will be made to provide after hours and Saturday sessions for customers that are currently working. Through our technology, 24/7 hour access to online content, job search and readiness tools and other supports, will significantly change the reach of the AJC’s for jobseekers, employers and other partners and stakeholders. Also, in an effort to recruit more customers to the American Job Centers, we will host “Open Houses”, most likely on a Saturday to attract the broadest audience possible. Children will be allowed to accompany their parents to these Open Houses as an incentive to attend.

### Career Navigation Center

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What skills must the career navigators have and, if they do not have them at hire, what professional development will be available?

Navigators work collaboratively with the Welcome Center and Navigation Center team; conducting career counseling on informed career decisions, matching to training opportunity, referring to community resources, providing job readiness assistance. Required skills include the ability to: 1) Assist the clients with the development of personal goals and job readiness Individual Employment Plan; 2) Coordinate with other agencies to assist clients and make appropriate referrals; 3) Network with community resources to provide services to address specific barriers customers must overcome to accomplish their goals; 4) Consult with other staff to promote customer goals and career related needs; 5) Monitor and record clients' progress to ensure that goals and objectives are met; 6) Prepare and maintain hard copy case files, including documentation such as clients' personal information, services provided, client contacts, and relevant correspondences; 7) Provide a comprehensive assessment of customers’ skills and aptitudes using a variety of tools and tests; 8) Possess knowledge of the “Workforce Innovations and Opportunity Act” (WIOA) as it pertains to this field; 9) Experience working with target populations (i.e. dislocated workers, low income, disabled, veterans, etc.); 10) Knowledge of computerized tools; e.g., accessing Internet-based job search information; 11) Effective communicator, including written, oral and public speaking for conducting workshops as needed; 11) Creative thinking, problem-solving, & decision-making skills; 12) Minimum of an Associates, Bachelors preferred; 13) Preferably bi-lingual English and Spanish, Portuguese, or Haitian Creole.

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Describe the career exploration process and how labor market information informs career and training decisions.

The Senior Business Services Liaison will play a leadership role in gathering market intelligence and sharing information with career center staff and partners. Career TEAM corporate will provide additional analytic support to source and mine relevant data (e.g., BLS, IPEDS), develop qualitative methodologies (e.g., employer surveys, focus groups) and translate the findings into implications for the career center service delivery system. CTL may access proprietary data sets such as ESMI to conduct granular analyses (e.g., zip code level) and to illustrate the relevance of competencies across multiple occupations and industry sectors – broadening the career path and allowing customers to “earn and learn” using available job openings that will move them along their pathway. The labor market information, combined with the forecasts of our employer partners, will be used to guide customers to training and employment that have the highest projected growth and earnings. The Career Navigator will share the information with customers so they can visual their career pathway and future advancement.

**Job Services Suite**

Please list the services that will be available in the Job Services Suite in the first year of operation? What would you add in subsequent years?

Job Service Suite will be fully operational in the first year of operation through our technology platform. All clients start with a “Do What You Are” career assessment to guide their career exploration and planning. Our content consists of a series of life skills and professional development modules designed to enhance confidence and improve employability. Customers will be able to build an ePortfolio where they can create video resumes and showcase achievements to potential employers. To gamify the experience, badges are awarded for the achievement of training and employment milestones. Customers can easily create resumes by following the guided instructions in our Resume Builder. Select from a library of Career TEAM templates or import your own. Upon completion, the resume is available for download and ready to send to potential employers by the Business Services Unit. Online applications are often designed to filter out candidates before they reach the interview. Prior to completing a live application, the Career EDGE Mock Job Application allows students to work through a simulation with video instruction and tips for common mistakes. With PSW’s input, we will continue to develop content and courses that meet skill gaps of our customers. Through the technology, independent job seekers will be able to browse and apply to employer vacancies created by our Business Services team.

Within our offices there are online learning centers with computers for customers to conduct independent job search activities and career exploration. Each lab computer will have a shortcut to the online portal, as well as, ONet online, the eligible training provider list, our employer portal, etc. to make it easy for customer to access the information.

To generate interest, we will also post resource boards that provide information about upcoming training cohorts, community resources, career pathway information, recruitment events, job fairs, and the upcoming workshop schedule. The Welcome Center Staff will also be knowledgeable about all resources and able to direct clients and answer their questions.

What steps must you take to create both the physical and virtual components of the Job Services Suite?

To create the physical Job Services Suite, we will need basic office equipment and supplies. We will establish a self-service computer lab where clients will have shortcuts to the online portal. A staff member will be available to respond to questions and provide assistance, guiding customers that work independently. We will also post information boards to generate interest in the available training and employment sectors.

The virtual Job Services Suite content currently exists. We would provide some customization for the PSW market to ensure compliant branding and messaging.



How will job seekers learn about the services?

Job seekers will learn about the services from Welcome Center Staff, Career Navigators, Business Services Staff, referrals from community based, faith based and partner organizations, through the PSW website, social media and peer to peer referrals.

What assistance will job seekers be given to fully use the technology?

Job Seekers will be provided assistance in the online learning center by our Welcome Center Staff and the Training Experts. An emphasis will be placed on teaching customers to navigate independently as part of their prof. dev.

What must be installed or services developed to make the job services suite accessible to people with disabilities and people whose native language is not English?

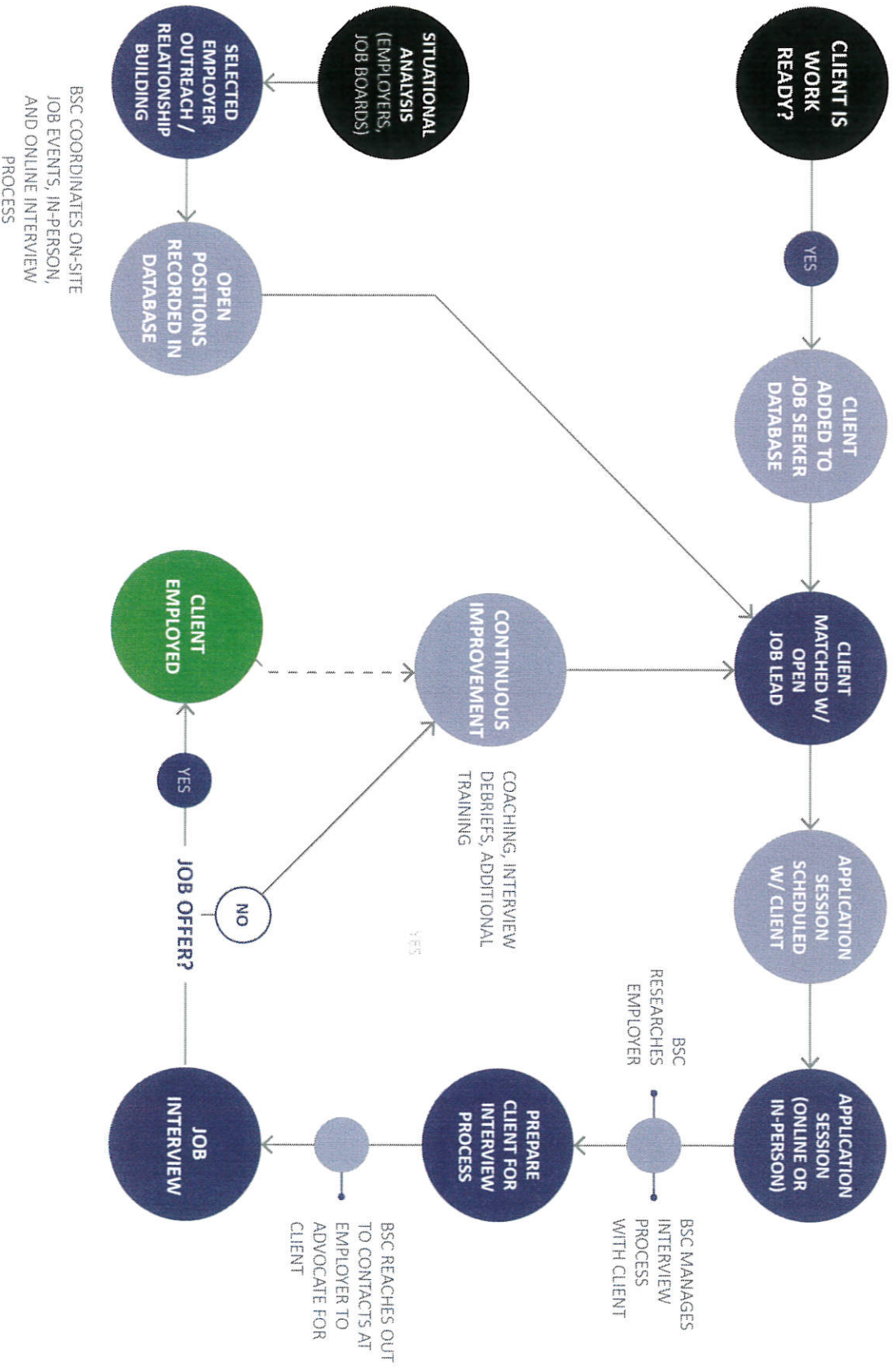
We will work with all of our partners to ensure access to service offerings, including physical and programmatic accessibility to individuals with disabilities. Our universal access plan includes: a) Accessibility to those in wheelchairs via ramp access; b) Assistive listening systems for the hard-of-hearing; c) Screen reading, magnification software and handheld magnifiers for the visually impaired; d) Literacy support software that allows customers to both see and hear what is displayed on the computer; e) Specialized keyboards and mice; and f) Software which can help with basic syntax, sentence structure, word choices, and spell checking, and can be used to help customers create attention-grabbing résumés and cover letters. Our staff will be available to assist One Stop customers in using these assistive devices. Career TEAM will staff each AJC office with bilingual staff to effectively serve the Spanish population in each office. We will utilize resources such as language line, refugee resettlement agency staff and internal talent to serve customers with limited English. All AJC staff will be trained on all community resources available for persons with limited English such as Adult Education Departments offering ESL instruction.

## Employer Marketplace

Describe or map the job placement process: (1) the process for individuals finding jobs through the career center and (2) the process for companies finding employees through the career center.

See diagram on following page.

Career TEAM Process for Individuals to Find Jobs Through the Career Center





What services will be available to employers with an assigned account manager?

All employers assigned to a Business Services Professional (account manager) will receive labor market information, candidate recruitment, and talent matching. In addition they will receive access to Career TEAM’s technology platform holds dual functionality: management of data and the delivery of content. Career TEAM offers its own content (e.g., Career EDGE) and curates third party content (e.g., Work It Daily). Employers can access content by setting up accounts. This content includes instructional videos (e.g., how to post jobs, competency-based hiring) as well as searchable, jobseeker profiles (e.g., picture, resume, project portfolios, e-mail connections). Career TEAM’s technology products and services enhance the content delivery and user friendliness of typical job boards that contain searchable lists of postings.

Describe the method for building the employer database referred to on page 4.

Approximately 700 new employer accounts were established last year. With over 35,000 employers in the region, Career TEAM estimates opening approximately 875 employer accounts. Our experience indicates that 80% of these employers will hire at least one worker. We offer high value solutions for our employer partners to become the talent resource of choice. Our robust employer marketplace streamlines the process of finding the right fit. Our Employer Match making platform allows employers to customize their search of job seekers that match their exact qualification. The technology already exists and will be populated by our Business Professionals prospecting activities. The Business Services Unit will be responsible for a quarterly prospecting plan to forecast employer needs, consider hiring trends, and pipeline talent to meet their placement goals. The prospecting plan will direct the employer outreach and engagement of the Business Services professionals.

We recognize the challenges associated with coordinating outreach to businesses across stakeholders (e.g., AJCs – adult services; AJCs – youth services, chambers of commerce, educational institutions). Career TEAM will work with the PSW to coordinate and refine strategy and partner MOUs associated with business outreach within Massachusetts and across regional and national employers that may fall within the domain of other partners. We will follow existing protocols and refine them to ensure common messaging to employers, ease of access by employers and efficiency in data sharing and management.

**Technology**

Discuss how you will (or will not) use technology to (1) provide services, (2) improve the customer experience and the quality of services, (3) increase the number of customers you are able to serve; (4) collect and use customer feedback, (5) reduce labor costs, and (6) reduce redundancy in the system.

Career TEAM’s technology platform holds dual functionality: management of data and the delivery of content. Career TEAM offers its own content (e.g., Career EDGE) and curates third party content (e.g., Work It Daily). Employers can access content by setting up accounts. This content includes instructional videos (e.g., how to post jobs, competency-based hiring) as well as searchable, jobseeker profiles (e.g., picture, resume, project portfolios, e-mail connections). Career TEAM’s technology products and services enhance the content delivery and user friendliness of typical job boards that contain searchable lists of postings. The ease of access and on demand nature of the technology improves customer experience since they will be able to take advantage of the content regardless of location or schedule. The technology scales up to as many users as needed and is currently being used by other regions with similar populations.

Career TEAM holds experience in developing data sharing agreements and “single sign on” processes, reducing redundancy that can enhance functionality of current technology investments such as MOSES. By having a single technology platform that integrates with existing databases provides improved reporting data, which reduces staff time.

**How to Get and Hold an Employers Attention**

- Use a sales-oriented approach
- Communicate value-based messages (e.g., we can reduce hiring costs by 50% and help provide a worker with a better fit)
- Use technology during the meeting to show the power of the process and reinforce the professional nature of the service deliver
- Offer additional resources that the employer can view online
- Offer other benefits (e.g., subsidized training or connections to other resource partners)
- Ask employers “what keeps you up at night”, share the information with partners and do something about it

High quality real time data allows us to dynamically respond to any dips. Career TEAM can also develop video-rich and custom content that appeals to job seekers and represents the PSW partners and employers. In fact, Career TEAM can work with to create tools, templates and videos for employers targeting key growth sector.

Identify the platforms and software packages that you will use and the ways in which they will be used to integrate the services across the career center. This is in addition to use of MOSES that is a requirement

Career TEAM designed the technology platform to improve efficiency and effectiveness in its own direct service delivery sites. Career Navigators and Business Services staff members can access the information and quickly review the career plans, career profiles, training and employment progress of customers. Our technology offers administrative dashboards to facilitate performance-based management and to support continuous quality improvement processes. Figure 3 shows screen a shot that show fictional training customers in training (i.e., estimated completion, program, training preference, % completed) and fictional customers in testing (i.e., test prep, pre-test, pass).

Career TEAM uses *Career EDGE* content to support competency-based soft skill development, career readiness, student success and other content to support professional development (e.g., Business Services Certification training, professional growth vignettes). Table 3 shows examples of Career EDGE content.

Table 3. Selected titles of Career EDGE content  
 Figure 3. Screen shot showing fictional customers in training

New Accounts	In Training	In Testing	Completed	
	Estimated Completion	Program	Training Preference	Status
Steve Jobs steve@apple.com	7/29/16	ServSafe	Online	75%
Johnny Appleseed john@gmail.com	8/18/16	CCSS	In Person	55%
Peter Pan peter@neververland.com	8/25/16	Quality Improvement	Online	43%
LeBron James lebron@cavaliers.com	9/12/16	MOS	In Person	31%
Stu Dent student@school.edu	8/27/16	AutoCAD	Online	20%
Tim Serpe tim@careerteam.com	8/25/16	QuickBooks	In Person	0%

Now Modules	New Modules	Next Modules
<ul style="list-style-type: none"> <li>• Getting to know yourself</li> <li>• Managing change &amp; attitude</li> <li>• Communication &amp; networking</li> <li>• Job search strategies</li> <li>• Resume, cover letter</li> <li>• Interview prep</li> <li>• Interview process</li> </ul>	<ul style="list-style-type: none"> <li>• Learning to learn</li> <li>• Time management</li> <li>• Study habits</li> <li>• Cultural diversity</li> <li>• Conflict resolution</li> <li>• Managing anxiety</li> <li>• Business plan creation</li> </ul>	<ul style="list-style-type: none"> <li>• Virtual reality                             <ul style="list-style-type: none"> <li>○ Interview prep</li> <li>○ Post interview</li> <li>○ Interview simulation</li> </ul> </li> <li>• Occupation specific coaching                             <ul style="list-style-type: none"> <li>○ IT</li> <li>○ Manufacturing</li> </ul> </li> </ul>

<ul style="list-style-type: none"> <li>• Interview follow-up</li> <li>• On-the-job success</li> </ul>	<ul style="list-style-type: none"> <li>• Financial literacy</li> </ul>	<ul style="list-style-type: none"> <li>○ Healthcare</li> <li>• Emerging social media</li> <li>• The certification process</li> <li>• Stackable credentials</li> <li>• <i>TBD – with input from PSW</i></li> </ul>
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Career EDGE content now reaches over 100,000+ college-level students across the nation and supports national initiatives such as the Platform to Employment (page 2). Career TEAM blends and braids Career EDGE content with other available products and services relevant to the labor market and in response to customer skill gaps. Career TEAM offers online training through an “Employer Engagement Academy” to support the development of the business staff and to deliver training to other workforce development (and now career service offices in institutions of higher education). Figure 5 shows example modules associated with this National Workforce

Figure 5. Example modules for creating an employer centric business development model



Development Association endorsed training.

Career TEAM’s technology innovations and service delivery practices respond directly to our own needs as direct service delivery providers and to the needs of our workforce development and educational customers.

**Target Population**

Describe the characteristics and needs of the targeted job seeker population and the ways in which the program design will meet those needs, including capacity to serve non-native English speakers.

The Metro South/West region is highly educated, older, and predominantly white. The region’s population is the most highly educated in Massachusetts. By 2008-2010, over 50% of the region’s working-age population (53.9%) had a bachelor’s degree or higher - far surpassing that of the state at around one third (35.6%). The working age

population in Massachusetts is one of the oldest in the nation, and the Metro South/West region is one of the oldest in the state with 55% over the age of 45. While the region has become more diverse in recent years, it remains predominantly white (84%), 2% black, 7% Asian, 5% Hispanic, and 2% other races. <sup>1</sup>

Career TEAM will review relevant data with PSW and partners to refine the priority market segments.

Table 4 shows recent service utilization data (planned v. actual) for Fiscal Year 2015 and 2016 (three quarters).

Table 4. Metro Southwest Customers by Customer Type (Source: OSCCAR Statewide All Offices and OSCCAR Statewide Rapid Response)

Metro South West	Total Customers Served			Unemployed			Self-identified PWD			Unemployment Insurance Claimants			Veterans		
	Plan	Actual	% of Plan	Plan	Actual	% of Plan	Plan	Actual	% of Plan	Plan	Actual	% of Plan	Plan	Actual	% of Plan
FY15 Quarter															
Ending 6/30/15	12000	11640	97%	11500	11033	96%	600	675	113%	7000	9039	129%	750	636	85%
FY16 Quarter															
Ending 3/31/16	12000	9206	77%	11500	8714	76%	600	511	85%	7000	7322	105%	750	502	67%

The technology enhancements will allow customers and employers to access services remotely and will create opportunities for more partners to actively participate in the service delivery process and use support systems and networks relevant to their community, cultures and linguistic needs. Career EDGE currently offers its first six modules in Spanish, and can customize (and translate) additional content as well to engage, support and address priority market segments. For these processes, we prefer to engage the help of local, community partners. Also, we will hire staff and encourage partners to make staff available who will be bi- or tri-lingual (e.g., Spanish, Portuguese, Haitian Creole).

How will you balance the needs of job seekers with the needs of employers?

Career TEAM’s industry responsive workforce development model allows employers to find workers with relevant skill competencies to fill open job positions – especially high quality employment opportunities that allow workers to “earn and learn” as they progress along a career pathway. By using employer demand information to inform our Career Navigation and Training services, job seekers have marketable credentials.

**Performance: Enrollment, Outcomes and Customer Satisfaction**

Discuss the strategies and quality control mechanisms you would use to ensure that your enrollment, outcome, and customer satisfaction goals are met for both job seekers and employers.

Career TEAM uses a sales-oriented approach across all aspects of the model. This means developing a marketing and communications strategy that will increase the visibility and brand strength of PSW. Career TEAM uses all distribution channels (e.g., radio, television, social media, blogs, door-to-door outreach campaigns) to deliver core messages and to create a “buzz” about services (see sidebar). Career TEAM identifies and supports community “champions” who represent trusted advisors within their communities. Career TEAM works with partners to hold high-energy and engaging events (e.g., job fairs, orientation activities) that make a positive impression on partners and participants. We review our enrollment goals, marketing and recruitment activities and adjust the tactical approaches accordingly. Equally important, to deliver the job placement outcomes requires the talent pipeline to be full and constantly refreshed.

How would you define and measure customer satisfaction?

We will work with the PSW to develop a meaningful and practical set of customer satisfaction measures relevant to the project and PSW partners. This extends beyond “demand” for services and “demand” to fill job orders. Career TEAM measures customer satisfaction across several dimensions. Our online learning content uses automated prompts to ask for feedback about customer experiences (above and beyond capturing completion rates and average time of engagement). Our direct service sites use a variety of customer satisfaction measures and methods. At one site, we used community input (partners and stakeholders) to redesign the community outreach

<sup>1</sup> [http://commcorp.org/wp-content/uploads/2016/07/resources\\_lmt-report\\_2012-06-metro-southwest.pdf](http://commcorp.org/wp-content/uploads/2016/07/resources_lmt-report_2012-06-metro-southwest.pdf)

methods and communication campaign, redesigned the orientation into a dynamic, interactive and technology enhanced process (including measuring how many indicated they would return) and watched enrollment climb. Customer input and experience remains critical to success. Our staff conducts an informal survey upon each interaction, “how did we do today?” and remain open to hearing what we can do differently and/or better. Our service delivery models that require touch points or formal exits include a more formal satisfaction survey including one of the most important questions, “would you refer a friend or colleague to service?” In the world of social media, positive customer experiences can prove critical to success. We also hold focus groups with customers and our staff to keep us close to the voice of the customer and to honor our company values (e.g., we only ask what we are willing to do ourselves).

Career TEAM will work with PSW, partners and the Career Center Initiative Board to identify key performance indicators (including voice of customer and employer satisfaction measures) and performance accountability measures. Career TEAM will develop and regularly update scorecards and dashboards that allow leaders and partners to quickly identify strengths and opportunities for improvement.

What quality control mechanisms will you use to ensure that the data entered into MOSES is both complete and accurate?

Career TEAM hires and retains exceptional talent, and has dedicated a full-time staff person to Quality Assurance Data management. Our leaders prefer a performance-based environment and depend on valid, reliable and timely data to assess the performance of the service delivery system and their teams. Our technology products contain data entry checks that prevent data entry errors. Our dashboards and scorecards contain numeric references that allow leaders to identify irregularities. Additionally, our corporate office conducts regular quality assurance reviews at both the programmatic and organizational level. The proposed career center director offers a strong analytic background and extensive experience in quality assurance across Career TEAM projects.

### Integration of Services: Coordination and Collaboration with the WIOA Partners

Discuss the steps you will take to create an integrated, efficient and effective service delivery system, including but not limited to leveraging the resources of the partners to improve the quality of programming and services delivered through the career centers.

Career TEAM will apply the same consultative approach that we do in our own projects and with our other clients (e.g., state agencies, regional workforce boards, community action agencies, non-profits, institutions of higher education). We will work with PSW to outline a participatory process and define the level and timing of involvement by partners and staff. Transparency, clarity of goals (i.e., outcomes) and communication remains critical to building consensus. In our opinion, this process proves foundational to creating a collective impact strategy that allows partners to move toward a common set of outcomes, understand their roles and responsibilities and identify capacity issues and opportunities to create a better return on investment. Career TEAM’s value-add technology creates opportunities for partners to innovate their own service delivery models, to access staff training, to build organizational capacity for attracting and retaining talent and ultimately to demonstrate higher impact.

The MOU is an attachment. How would you develop consensus and organize the partners?

MOUs reflect agreed upon outcomes, define expectations, decision-making processes and roles and responsibilities, among others. Partnerships require care and feeding like any other type of relationship, hence our commitment to supporting Partner Liaisons. A participatory process creates a more productive and synergistic environment. Our transparent, performance-based and data-driven process creates an environment for authentic conversations about what partners can offer and how partners benefit.

How will you organize the partners to complete ongoing projects identified in the MOU or required by WIOA?

Career TEAM creates value for customers, employers and partners. Our entrepreneurial and innovative approach results in cost savings, improved outcomes and increased access for customers and partners. We parlay those results and momentum into scaling or field testing a new model. Workforce development requires a team effort,



especially for disadvantaged populations. Our work with Platform to Employment attests to our “field building” work and developing a model that benefits individuals nationwide.

Describe a training program to prepare all staff, including partner staff. The schedule will be adjusted to reflect October start up.

We will develop an orientation and training plan to support the transition and redesign process to help staff and partners become proficient with the enhanced service delivery model. All of the training content exists (e.g., using EDGE, customer service, job development certification) and is available through the technology platform. Qualified trainers from other sites will support implementation.

Transitioning to our technology-enhanced career service model will begin in on or before July 1<sup>st</sup>, 2017 with the establishment of three transition groups: 1) TEAM; 2) TALENT; and 3) TECHNOLOGY. Each group will focus on a key feature of the model and will be led by dedicated and experienced members of our leadership team. Groups will be responsible for transition planning and execution, as well as overall integration to ensure a continued and uninterrupted service delivery. These groups will continue on to support operational excellence during implementation proper (beyond July 1, 2017). Our lead Trainer which we will identify from the local area or existing staff, will oversee the entire transition process and will be intimately involved with each of the three transition groups. Given the opportunity our corporate trainers could ensure the partners, sites, and job seeker customers of Metro Southwest are educated, empowered and equipped by delivering and coordinating world class training and cultivating an environment of innovation and achievement. Trainings will be delivered in person as well as online using our proprietary digital platform.

How will staff members be held accountable for customer service and achieving the goals, what are the incentives for excellent performance, and what are the consequences for not performing?

Staff are given monthly goals that relate to their personal productivity and the overall achievement of the center. Some members of the team (non-administrative) are provided with monthly commissions for exceeding their personal productivity goals. All departments will meet weekly to report their progress toward goal, an accountability session. If a staff member is consistently having troubling meeting expectations, re-training and coaching with their supervisor will be conducted, If they continue to not meet expectations, they may be subject to corrective action including verbal and written notices.

Describe a professional development program that supports excellent customer service and innovation.

Professional development program that supports strong staff will yield excellent customer service and innovation. By providing team members with month, personal one to one session with their supervisor there is constant feedback on their work and opportunities for growth. Staff that are provided an opportunity to set formal goals each year can work with their supervisor to make progress toward those goals. Supervisor can in turn provide or create opportunities for staff members to develop. Professional development programs must be collaborative to be successful in impacting staff and the organization.

