



METRO SOUTH/WEST WORKFORCE BOARD

REQUEST FOR PROPOSALS: Operation of Youth Programs in Waltham, Newton, and Brookline for the MassHire Metro South/West Workforce Board

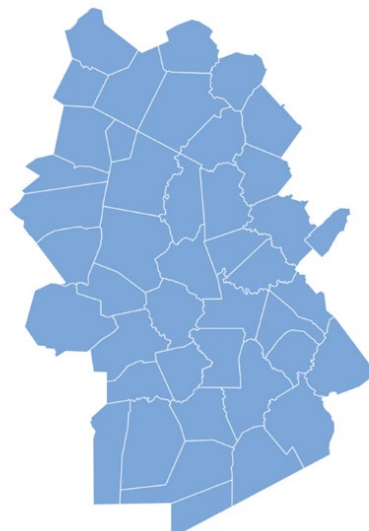
RFP#: 2023

Issued:	April 13th, 2023
Deadline for Questions:	April 19th, 2023
Bidders Conference:	April 19th, 2023
Proposals Due:	May 15th, 2023
Workforce Board Approval:	Jun 8th, 2023
Formal Award Notification:	June 12th, 2023
Target Start Date:	July 1st, 2023

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508.291.6910 Extension 2

Acton
Ashland
Bedford
Bellingham
Boxborough
Brookline
Canton
Carlisle
Concord
Dedham
Dover

Foxborough
Framingham
Franklin
Holliston
Hopkinton
Hudson
Lexington
Lincoln
Littleton
Marlborough
Maynard



Medfield
Medway
Millis
Natick
Needham
Newton
Norfolk
Norwood
Plainville
Sharon
Sherborn

Southborough
Stow
Sudbury
Walpole
Waltham
Wayland
Wellesley
Weston
Westwood
Wrentham

INTRODUCTION AND SCHEDULE

Introduction

The MassHire Metro South/West Workforce Board (MSWWB) is issuing this request for proposal (RFP) to select a provider for the region's Workforce Innovation and Opportunity Act (WIOA) Title I Youth year-round services. While the Metro South/West area covers forty-three cities and towns, this RFP aims to procure a provider who will deliver services to Out-of-School youth ages 17-24 in Waltham, Newton, and Brookline.

The selected provider will deliver education, employment, and training services to WIOA-eligible Out-of-School youth in the target communities. Successful proposals will design and deliver innovative, comprehensive, performance-based programs that result in measurable academic and employment outcomes.

Up to \$150,000 of Workforce Innovation Opportunity Act youth funding is available to support 15 to 20 participants in programs for WIOA-eligible youth. The contract will start on July 1, 2023, and end on June 30, 2024. The contract may be renewed for one additional fiscal year, contingent on performance. Performance and full compliance with federal, state, and local statutes, including all terms of the contract will be monitored and executed by the MSWWB. For more information and a copy of the WIOA regulations, see <http://www.doleta.gov/wioa/>.

Schedule

April 13 th , 2023	Request for Proposals released
April 19 th , 2023	Deadline for submission of written questions
April 19 th , 2023	Bidder's Conference Webinar 9:00am EST
May 15 th , 2023	Proposals due by 4:00pm EST
Jun 12 th , 2023	Bidders notified of outcome
Contract start date	July 1st, 2023

Bidder's Conference

A Bidder's Conference will be held via Zoom April 19th 2023, 9:00 am. The link is below:

<https://us02web.zoom.us/j/89699651131?pwd=Sm9XK3dLa2Qwam4rdUF2YzhCSmFUZz09>

BACKGROUND AND GOVERNANCE

Metro South/West Region

Incorporated as a 501(c)(3), the MassHire Metro South/West Workforce Board's mission is to lead the development of a dynamic workforce system for our region that advances both workers and businesses and in the Commonwealth. As one of sixteen (16) Local Workforce Areas in the state of Massachusetts, the MassHire Metro South/West Local Workforce Area comprises forty-three cities and towns. The General Manager of the Town of Norwood serves as the Chief Elected Official (CEO) and has been granted WIOA designation by the Governor of Massachusetts. The MassHire Metro South/West Workforce Board is the fiscal agent for Workforce Innovation Opportunity Act (WIOA) funds and provides Board staffing pursuant to WIOA.

Workforce Innovation and Opportunity Act Overview

On July 22, 2014, the Workforce Innovation and Opportunity Act (WIOA) was signed into law. WIOA is a federal program funded through the U.S. Department of Labor and is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. WIOA provides new authorizing legislation for programs previously authorized under the Workforce Investment Act.

WIOA outlines a broad youth vision that supports an integrated service delivery system and provides a framework through which states and local areas can leverage other Federal, state, local, and philanthropic resources to support in-school youth and out-of-school youth. WIOA affirms the commitment to providing high quality services for youth and young adults beginning with career exploration and guidance, continued support for educational attainment, opportunities for skills training in in-demand industries and occupations, and culminating with a good job along a career pathway or enrollment in post-secondary education.

Resources and Labor Market Information

The Board has developed a Local Plan that contains labor market information about the area. Since the information is readily available to bidders, it will not be repeated in this RFP. The 2018 to 2021 Local Strategic plan may be accessed directly at:

<https://www.mass.gov/service-details/metro-south-west-local-plan-package>

In addition, the Local WIOA planning figures may be obtained in electronic format upon request via an e-mail directed to Greg Bunn at gbunn@masshiremsw.com

The Commonwealth of Massachusetts WIOA Youth policies may be found at:

<https://www.mass.gov/service-details/massworkforce-wioa-youth-policy-issuances>. Proposers must be knowledgeable regarding the statutes, regulations, rules and policies for the funding streams identified in the chart in section II.C. A copy of the Workforce Innovation and Opportunity Act and regulations may be found on the U.S. Department of Labor web page at <https://www.doleta.gov/WIOA/>.

Areas of emphasis

The Cities and Towns of Waltham, Newton, and Brookline are the primary areas services are being sought as part of this RFP. Proposals that do not indicate the capacity to serve these areas will not be accepted.

WIOA emphasizes the development of Career Pathways designed to transition youth into the workforce. Career Pathways are a collection of programs and services intended to develop a youth's core academic, technical, and employability skills, and provide them with continuous education, training, and placement into high-demand fields. The WIOA workforce development system is outcome-based and includes services delivered through fourteen required program elements. Although the provider does not need to provide all fourteen program elements, all services should be available to youth participants. Vendors may choose to offer select elements through partner agencies.

The MassHire Metro South/West Workforce Board has outlined five areas of concentration for the purpose of this request. Proposals that incorporate any or all of these strategies into their program designs will be given priority consideration.

- 1. High School Equivalency/Adult Basic Education** (Tutoring Study Skills Training, Instruction and Dropout Prevention) activities that lead to completion of a high school diploma or recognized equivalent. Development of educational achievement skills that leads to the completion of a postsecondary diploma/credential.
- 2. Postsecondary Preparation and Transition Activities** that help youth prepare for and transition to postsecondary education and training.
- 3. Occupational Skill Training** – is an organized program of study that provides specific skills and leads to proficiency in an occupational field.
- 4. Work Experience Placement:**
Under WIOA, all programs must provide work experience,, the region is required to spend a minimum of 20% of all WIOA Youth funds on paid and unpaid work experience, including activities involved in developing and overseeing the work experience, as well as any subsidized wages. The work experience may include internships and job shadows, pre-apprenticeships, on-the-job training, summer and year-round jobs, or other forms of work experience which will supplement classroom activities.
- 5. Support Services**
Services that enable youth to participate in program activities such as assistance with books, fees, school supplies, transportation, tools, uniforms, and certification requirements.

FUNDING AND PERFORMANCE PERIOD

Funding Levels

\$150,000 of Workforce Innovation Opportunity Act youth funding is available to support programs for WIOA-eligible out-of-school youth. Applicants should identify in their proposal the number of proposed slots, and the budget required to deliver services at the proposed service level. By regulation, 20% of the total allocation must be spent on work experience activities.

Availability of Funds

It is understood that funds will fluctuate from year to year. The contract agreement shall be modified to increase or decrease funding as needed to reflect actual funds received during the contract period. The successful Contractor will be awarded a cost-reimbursement contract for work performed pursuant to this RFP. The MSWWB may expand the scope of the contract to include other programs, funding or requirements that the MSWWB deems necessary and appropriate.

All agreements are subject to the availability of funds from the MassHire Metro South/West Workforce Board Local Workforce Area.

Performance Period

The MassHire Metro South/West Workforce Board will award WIOA Youth Program Provider contracts to entities that demonstrate an ability to effectively deliver and manage services as described herein. It is the expectation of the MSWWB that respondents will become proficient in their understanding of the WIOA Youth services, subsequent regulations, and other funding sources. All proposals must be comprehensive and address the full scope of services or demonstrate a relationship with other entities that together will deliver the full scope of services identified within this RFP.

The MassHire Metro South/West Workforce Board anticipates funding grant agreements effective July 1, 2023 – June 30, 2024. The contract may be renewed for one additional fiscal year, contingent on performance.

Contract Type

Contracts executed as a result of this RFP process will be paid through cost reimbursement. Final contracts will also be subject to any changes in legislation, regulations or policies promulgated by the funding sources. The MSWWB reserves the right to vary or change the terms of any contract executed as a result of this RFP, including funding levels, scope of services, performance standards, referral sources and contract term, as it deems necessary.

Eligible Respondents

- The respondent may be a private, for-profit, or non-profit company or a government agency. Eligible bidders in Institutions of higher education include.
- Community-based organizations

- Non-traditional public schools, e.g., night, or adult school, career or technical education school
- Workforce intermediaries
- Business organizations, including chambers of commerce.
- Labor organizations
- A consortium of organizations

Respondents may submit proposals in which subcontractors are identified to provide program components. Respondents may also identify organizations with which they will collaborate to enhance the project design. However, any proposal submissions from a collaboration of two or more entities should clearly provide the following information in the narrative portions of the proposal:

- Identify the qualified fiscal agent for the collaborative partnership.
- State the roles and responsibilities of each collaborator.
- Include an organizational chart for each organization and for the collaborative.
- Describe how funds will flow within the collaborative.
- Identify the percentage of each partner's fiscal responsibility.
- Identify the qualified fiscal agent for the collaborative partnership.

Successful respondents must demonstrate past experience with similar programs and achievement of successful outcomes; demonstrate ability to innovate; design and develop complex programs with multiple sources of funding; achieve, track, and report outcomes; meet government accounting and expense requirements.

Any private for-profit entity considering responding to this RFP must understand that they are required to adhere to the Uniform Guidance at 2 CFR part 200. Department of Labor's (DOL) adoption of the Uniform Guidance at 2 CFR 2900.2 expands the definition of 'non-Federal entity' to include 'for-profit' and 'foreign' entities. As such, any private for-profit entity that is a direct grant recipient or sub-recipient of a DOL award must adhere to the Uniform Guidance. Procurement standards under the Uniform Guidance at 2 CFR 200.323(b), require that profit be negotiated separately from the price in addition to cost analysis and/or price analysis. The MSWWB will conduct such negotiations should a for-profit entity be selected. Records documenting or detailing the procurement history, including the negotiation and analysis of profit, will be maintained by all entities (2 CFR 300.318(h)(i))

SCOPE OF SERVICES

Target Population

The Cities and Towns of Waltham, Newton, and Brookline are the primary areas services are being sought as part of this RFP. Proposals that do not indicate the capacity to serve these areas will not be accepted.

Out-of-School Youth programs funded through this RFP must provide a combination of education services, exposure to employment, work experience and additional supportive services in order provide each youth participant with a recognized credential, progress towards self-sufficiency, and an understanding of workplace standards.

An Out-of-School Youth is defined as “an eligible youth who is a high school dropout, or an eligible youth who has received a secondary school diploma or its equivalent but is basic skills deficient, unemployed, or underemployed.”

Eligibility criteria for Out-of-School (OSY) youth:

- ***Citizenship/ Work Eligible and Selective Service Compliance AND***
- ***Not Attending School***
- ***16 - 24 years at the time of enrollment AND,***
- ***One or more of the following:***
 - High school dropout;
 - Within the age of compulsory school attendance but has not attended school for at least the most recent complete school year calendar
 - A recipient of a secondary school diploma or its recognized equivalent who is a low income individual and is either basic skills deficient or an English language learner;
 - Subject to the juvenile or adult justice system;
 - A homeless child or youth, a runaway, in foster care or has aged out of foster care, a child eligible for assistance under section 477 of the Social Security Act, or in an out-of-home placement
 - An individual who is pregnant or parenting;
 - An individual with a disability; or
 - A low-income individual
- ***Locally defined Barriers***
 - * Child of a Parent receiving TAFDC (cash assistance)
 - * Young Adult Living in Subsidized Housing
 - * Youth that are in temporary housing via a friend or relative who has no legal relationship to the youth

** OSY are required to be low-income if they are: a US citizen/ work eligible, not attending school, 16- 24 years old meets one of the following criteria:*

HS Grad/HiSET and basic skills deficient or an English language learner Individual who requires additional assistance to enter or complete an educational program or to secure or hold employment.

Program Design and Guidelines

Recruitment and Outreach

As previously noted, this RFP is concentrated on communities in and surrounding the cities and towns of **Waltham, Newton, and Brookline**. Vendors under this RFP must be able to market their services to young adults ages 17-24 who are not connected with education and/or employment. The outreach and

recruitment efforts of program vendors should include identifying potentially eligible youth through interfacing with local school systems, government agencies and community-based organizations.

Program Elements

Respondents to this Request for Proposals should plan to present a program concept that includes each of the following program elements, either directly provided by the applicant or indirectly through referrals to other organizations/resources.

The MassHire Metro South/West Workforce Board has outlined five areas of concentration for the purpose of this request. Proposals that incorporate any or all of these strategies into their program designs will be given priority consideration. (a),(b), (c), (d), (g)

- a. **Tutoring, study skills training, instruction and dropout preventions:** Development of educational achievement skills that leads to the completion of the requirements for a secondary or postsecondary diploma/credential.
- b. **Alternative secondary school services or dropout recovery services:** Alternative secondary school services or drop out recovery services.
- c. **Paid and unpaid work experience:** Work experience which includes summer employment, year-round employment, pre-apprenticeship, internships/job shadow and on-the-job training opportunities.
- d. **Occupational skills training:** An organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields.
- e. **Education concurrently w/workforce preparation:** Integrated education and training that occur concurrently and contextually with workforce.
- f. **Leadership development:** Opportunities that encourage responsibility, confidence, employability, self-determination, and other positive social behaviors.
- g. **Supportive Services:** Services that enable youth to participate in program activities such as assistance with books, fees, school supplies, transportation, tools, uniforms, and certification requirements.
- h. **Adult Mentoring (12-month min):** Participants receive adult mentoring for a period of not less than 12 months that connects to the youth's goals.
- i. **Follow Up Services (12 Months):** Follow-up services are provided for 12 months unless the participant declines to receive follow-up services or cannot be located or contacted.
- j. **Comprehensive Guidance and Counseling:** Individualized counseling which includes drug and alcohol abuse, and mental health counseling, and referrals to partner programs.
- k. **Financial Literacy Education:** Supports the ability of participants to create budgets, learn how to manage spending, credit, and debt.
- l. **Entrepreneurial Skills Training:** Provides the basics for starting a small business.
- m. **Labor market Services:** Participants receive access to career counseling, career exploration, career awareness, and the use of labor market tools.
- n. **Transition to Postsecondary Education:** Participants receive access to job exploration counseling, work-based learning experiences, instruction in self-advocacy, work readiness training.

Intake, Eligibility Determination, and Registration: –MSWWB will conduct a final eligibility determination for all WIOA youth participants. Outreach, intake, initial assessment, and gathering of documentation will be the responsibility of the provider(s). Youth may not be enrolled or receive WIOA services without first having their eligibility verified by the MSWWB WIOA Youth Director.

Objective Assessment - Prior to enrollment in WIOA services, the selected provider must conduct an objective assessment for each youth participant. The assessment is the basis for each participant's Individual Service Strategy (ISS) . Assessment tools must be appropriate for the target population and include a review of academic and occupational skill levels, prior work history, employability, and career interests/aptitudes. Obstacles to successful employment and education outcomes and relevant support services should be identified. Results of the objective assessment must be submitted to the MSWWB prior to enrollment.

Individual Service Strategy (ISS)/Employment Plan: The young adult's objective assessment is used to develop the ISS with the participant. The ISS is an individualized plan that identifies career interests, short- and long-term education/employment goals, WIOA Youth program elements and support services. The ISS sets a timeframe in which each young adult will be expected to complete all activities related to the specified goals. As goals are accomplished, the ISS should be regularly updated with young adults. The ISS will clearly connect WIOA services to each young adult's goals and directly link to one or more WIOA Title I performance outcomes.

Case Management: Effective services are delivered through case management and facilitate young adults' goal attainment. Case management is provided from the recruitment/enrollment phase through a mandatory follow-up period of one year. The case manager coordinates services to prepare young adults for adult basic education, postsecondary education, vocational training, and employment.

Follow-Up: Follow-Up services are a critical component of WIOA programming. These services must be provided to all participating youth for a minimum of twelve (12) months after exit from the program. The purpose of these services is to track successful employment and education retention. Follow-Up services help participants address issues in the workplace or school that may prevent job or education retention.

PERFORMANCE OUTCOMES, REPORTING AND TRACKING

WIOA Youth Performance Measures

Under WIOA, achievement of measurable performance outcomes is a critical expectation of the Youth Program Providers. The selected bidder will be responsible for a portion of the overall FY24 performance. As a frame of reference, the chart below lists the current FY23 WIOA Youth performance measures for the region. Performance measures for FY23, the period covered by this RFP, are subject to change. WIOA Youth funded in-school and out-of-school YPPs work together with the Youth Services Operator staff to ensure regional goals are met.

WIOA Performance Measure	Definition	FY23 Goal
Entered Employment	Placement in Employment, Education or Training (2 nd quarter after exit)	40
Entered Enter Post-Secondary Education or Training	Placement in Employment, Education, or Training (4 th quarter after exit)	10
Credential Attainment	Credential Rate (within 1 year after exit)	70
Median Earnings	Median Earnings (2 nd quarter after exit)	\$19.63

Descriptions of each performance measure:

Youth Employment and Education rate 2 nd quarter after exit	The percentage of program participants who are in education or training activities, or in unsubsidized employment, during the second quarter after exit from the program.
Youth Employment and Education rate 4 th quarter after exit	The percentage of program participants who are in education or training activities, or in unsubsidized employment, during the fourth quarter after exit from the program.
Median earnings 2 nd quarter after exit	The median earnings of participants who are in unsubsidized employment during the second quarter after exit from the program.
Credential Attainment	The percentage of those participants enrolled in an education or training program (excluding those in on-the-job training (OJT) and customized training) who attain a recognized postsecondary credential or a secondary school diploma, or its recognized equivalent, during participation in or within one year after exit from the program. A participant who has attained a secondary school diploma or its recognized equivalent is included in the percentage of participants who have attained a secondary school diploma or its recognized equivalent only if the participant also is employed or is enrolled in an education or training program leading to a recognized postsecondary credential within one year after exit from the program

Framework and Related Services

The Metro South/West Workforce Board (MSWWB) is the administrative entity and Fiscal Agent for WIOA Title I Youth Programs. MSWWB will provide final WIOA Youth eligibility verification, enrollment in MOSES, the statewide WIOA database, program tracking, and reporting for youth served by providers selected through this RFP based on program data and reports provided by the selected contractor. In addition, the MSWWB will provide policy guidance, technical assistance, and oversight for all WIOA youth activities.

Eligibility determination –MSWWB will conduct a final eligibility determination for all WIOA youth participants. Outreach, intake, initial assessment, and gathering of documentation will be the

responsibility of the provider. Youth may not be enrolled or receive WIOA services without their eligibility verified by MSWWB staff. Hard copies of all required eligibility documents must be provided.

Objective assessment – All WIOA youth will have an objective assessment prior to participation. This assessment will be the basis of each youth’s individual service strategy. The objective assessment will include a review of the youth’s academic and occupational skills, work history, and service needs. The objective assessment will be conducted by staff from the selected youth provider. Copies of required assessments must be submitted prior to enrollment.

Individual Service Strategy (ISS)- an individual service strategy for each WIOA youth will be developed and maintained by the selected youth provider. In accordance with WIOA Section 129 (c)(1)(B), all eligible WIOA youth will have an Individualized Service Strategy (ISS) plan developed as required for program participation. The ISS developed for each youth participant must include:

1. Career planning and the results of objective assessments
2. Education and employment goals
3. Achievement objectives and services
4. A direct linkage to one or more performance indicators
5. Identification of an appropriate career pathway

The ISS must be directly linked to one or more WIOA indicators of performance, identifies career pathways that include education and employment goals, appropriate achievement objectives, and appropriate services for the participant considering objective assessments.

Data Management - The provider will retain all participant data, including enrollment information, services, and case management notes, for use by MSWWB. MSWWB will enter all required data into the statewide database (MOSES) used for tracking and reporting.

Start/End Dates and Program Length

Programs should be designed to start on or after July 1st, 2023, and to provide at least twelve (12) months of continuous programming. Open entry/exit designs are encouraged. Programs must operate year-round to allow continuing, long-term service to youth with substantial educational needs. Enrollees may remain in the program for more than twelve months, if they continue to require assistance and support. Continued contracting for services past one year or the end of the fiscal year (June 30th) is dependent upon the program meeting its performance goals and local funding. In addition, programs approved for funding for a second year will be subject to the performance requirements under WIOA.

Proposal Narrative Guidelines

The narrative response section of the proposal should be no more than 8 pages. Each subpart below should be addressed in the detail necessary to provide reviewers with sufficient information to score your proposal. The narrative(s) should address the following questions:

1) Target Population: (0-10 points)

- Describe your outreach and recruitment strategies to recruit eligible youth to participate in your planned program.
- Identify the number and targeted population of youth for your program. Provide specific background information to demonstrate that there are sufficient numbers in this target population to achieve your program's proposed enrollment goal.

2) Organizational Background/Staffing: (0-10 points)

- Briefly describe your organization and its experience with the provision of education and/or training services to the targeted youth population.
- Indicate the youth service backgrounds and qualifications of staff that your agency will assign to provide the services under this RFP.
- Describe how your agency's staff development policies and activities will ensure that the staff working on this project have the necessary qualifications to meet youth enrollee needs.

3) Program Design (0-40 points)

- Briefly describe how your organization will design and deliver each of the required 14 elements of service. Please describe which elements your organization will provide, and which elements will be coordinated through referrals to other organizations/resources.
- Indicate whether your project will incorporate any or all of the five areas of emphasis outlined at the beginning of the RFP. **(0-15 points)**

** Briefly describe your strategy to provide activities that lead to the completion of a high school equivalency credential.*

**Indicate how the program will develop and deliver mandatory work experience through internships and/or employment*

**Describe your strategy to prepare participants for transitioning to postsecondary education and training.*

** Describe how you will advise participants to enroll in occupational skills training. Explain the certificates or credentials that may be attained.*

** Describe your strategy to provide support services that encourage youth participation in services.*

- Describe how you will deliver case management services to the target population. Explain strategies to enroll and retain youth in adult basic education, postsecondary education, vocational training, and employment services.
- Will the proposed services be in a new program, or will they be integrated into an existing program that your agency is already operating?
- Describe how you will maintain follow-up contact and assist the youth who leave your program, both the youth who drop out of the program as well as the successful program graduates.
- Identify any collaborators or partners for the project and their roles/responsibilities.

4) Outcomes (0-10)

WIOA has specific outcomes designated for its Youth programs, primarily placement into employment or post-secondary education or training, enhanced by educational attainments. These have been outlined on preceding pages of this RFP.

- Identify specific, measurable outcomes of your program, including credential attainments, job placements, or post-secondary education enrollments. For example, how many participants will obtain a high school diploma or equivalent? How many participants are expected to gain credentials/certificates or enroll in postsecondary education/skills training? Will program services prepare them for a certain industry or type of employment?
- Describe your agency's previous performance, over the past two years, with the target youth group. If you have not received WIOA funding in the past, please try to correlate your agency's performance as closely as possible to these measures – education, employment, and work readiness preparation.

5) Budget (0-15 points)

Complete a narrative for the costs proposed in parts A, B, and C and complete the Budget Worksheet included in Attachment 5. **NOTE: Narratives should include detailed descriptions of *match contributions* as well.**

1. **A) Salaries and Wages** – Address the following:

Explain the justification for each staff position proposed. Number of hours per week and number of weeks proposed should correspond with the length of program operation. Bidders proposing several staff should complete a staff time schedule for each position proposed. (Attachment C – sample staff time schedules are also provided.) This will aid reviewers in

determining the reasonableness of staffing costs of proposals that contain a weekly total of person hours disproportionate to the daily schedule of the program participants.

Bidders proposing more than one staff position during the same time periods must explain why. Proposed wage rates must be justified (i.e., skill, experience, responsibility, seniority).

2. **B) Fringe Benefits** – Fully explain each component of your fringe benefit package. If necessary, fully explain any unusual components.
3. **C) Other Line Items**- Fully explain and justify each proposed cost in the space provided. Be sure to include the rationale for each proposed cost (i.e., historical data, units per participant, etc.). Use additional space if necessary.

Budget Note: all expenses associated with this RFP will be program costs.

SUBMISSION REQUIREMENTS AND INSTRUCTIONS

Submittal Procedure and Format

To be considered for funding, applicants must submit their proposal via email to wbinfo@masshiremsw.com. All applicants will receive an email response verifying receipt of the proposal. Completed RFP responses must be submitted by May 15, 2023 by 4:00 p.m. (EST).

PROPOSALS RECEIVED AFTER THIS DATE AND TIME ARE LATE AND WILL NOT BE ACCEPTED. It is the bidder's responsibility to ensure responses are received by the date and time listed above. "Technical issues" will not be a sufficient reason for late responses.

All proposals must be organized and assembled as described in this Section. Copies of forms that are bolded are included in the Attachments to this RFP. Please submit proposal in this order:

1. **Completed Cover Sheet (Attachment 1)**
2. **Proposal Summary Sheet (Attachment 2)**
3. Partnership Chart (only if a partnership application) (Attachment 3)
4. Memorandum of Understanding (MOU) with partners (only if a partnership application)
5. Narrative Response (No more than 8 pages)
6. Price Proposal: **Budget and Budget Narrative (Attachment 4)**
9. **Fiscal Questionnaire (Attachment 5)**
11. IRS W-9 Request for Taxpayer Identification Number and Certifications
12. If applicable, current Determination Letter from IRS verifying the organization is exempt from federal income tax under section 501(c)(3)
13. Certificate of Good Standing (from the Massachusetts Department of Revenue at www.mass.gov/dor)
 - a. Bidders who do not pay taxes in Massachusetts shall submit a certificate of good standing or other similar documentation from a state regulatory agency indicating that the bidder is current on tax payments and filings.
14. Copy of most recent audited financial statement
 - a. including audits under Uniform Guidance, if applicable
15. Signed Statement of Compliance and Disclaimer **(Attachment 6)**

General Instructions

Applicants must follow these general instructions when preparing and submitting their responses:

- Submit response as a single PDF document, except for Budget and Budget Narrative, which should be submitted in EXCEL format
- 8 1/2 x 11 letter size paper
- Numbered pages
- One-inch margins
- Single-spaced
- Minimum 11-point font

Attachment 1 -- Application Cover Sheet

Please note all proposals become the property of MassHire Metro South/West Workforce Board

Part A

Name of Lead Applicant Organization	
Federal Employer ID	
Address	
In the space provided, please describe your organization's mission	

Part B

Name	Title	Email Address	Phone number(s)
Primary Contact Person			
Authorized Signatory			
Fiscal Contact			

If this is a joint application with collaborating partners, please complete Part C. Please add additional rows if needed.

Part C

Name of Partner Organization	Address of Partner Organization	Primary Contact at Partner Organization	Primary Contact email and phone

Part D

Please provide three (3) business references.

Name and Title	Business Name	Business Address	Phone number

Attachment 2 – Proposal Summary Sheet

▪ PROPOSAL SUMMARY SHEET ▪

NAME OF ORGANIZATION: _____

LOCATION OF TRAINING: _____

PROGRAM DESCRIPTION: _____

<u>EDUCATION CLASSES</u>	<u>HOURS/WEEK</u>	<u>WORK EXP. & OTHER SRVCS.</u>	<u>HOURS/WEEK</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<u>YOUTH OPERATOR SERVICES</u>	<u>OTHER SERVICES ACTIVITIES</u>		
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

TOTAL CLASS HOURS PER WEEK PER PARTICIPANT: _____

TOTAL WEEKS OF PROGRAMMING: _____

NUMBER OF PARTICIPANTS: _____

SCHEDULE: (Please provide both Summer Schedule and Year-Round Schedule Below - if different)

Full Year Schedule:

START DATE: _____ END DATE: _____ DAYS (Circle): M T W Th F TIME: _____

Summer Schedule: (If different from above)

START DATE: _____ END DATE: _____ DAYS (Circle): M T W Th F TIME: _____

<u>PROPOSED ENROLLMENTS and COMPLETIONS</u>	<u>TOTAL</u>	<u>PERCENT OF TOTAL</u>
TOTAL PROJECTED ENROLLMENTS:	_____	_____
TOTAL PROJECTED COMPLETERS BY 6/30/24 :	_____	<u>100%</u>
<u>PROPOSED OUTCOMES</u> (Graduates may count in more than one category)		<u>PERCENT OF TOTAL COMPLETERS</u>
A) Entered Employment/Edu/Training	_____	_____
B) Employment/Edu/Training Retention	_____	_____
C) Credential Rate	_____	_____
D) OTHER (None of the above)	_____	_____

▪ PROPOSAL SUMMARY SHEET ▪

NAME OF ORGANIZATION: _____

LOCATION OF TRAINING: _____

PROGRAM DESCRIPTION: _____

<u>EDUCATION CLASSES</u>	<u>HOURS/WEEK</u>	<u>WORK EXP. & OTHER SRVCS.</u>	<u>HOURS/WEEK</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<u>YOUTH OPERATOR SERVICES</u>	<u>OTHER SERVICES ACTIVITIES</u>		
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

TOTAL CLASS HOURS PER WEEK PER PARTICIPANT: _____
 TOTAL WEEKS OF PROGRAMMING: _____
 NUMBER OF PARTICIPANTS: _____

SCHEDULE: (Please provide both Summer Schedule and Year-Round Schedule Below - if different)

Full Year Schedule:

START DATE: _____ END DATE: _____ DAYS (Circle): M T W Th F TIME: _____

Summer Schedule: (If different from above)

START DATE: _____ END DATE: _____ DAYS (Circle): M T W Th F TIME: _____

<u>PROPOSED ENROLLMENTS and COMPLETIONS</u>	<u>TOTAL</u>	<u>PERCENT OF TOTAL</u>
TOTAL PROJECTED ENROLLMENTS:	_____	<u>100%</u>
TOTAL PROJECTED COMPLETERS BY 6/30/24 :	_____	_____
<u>PROPOSED OUTCOMES</u> (Graduates may count in more than one category)		<u>PERCENT OF TOTAL COMPLETERS</u>
E) Entered Employment/Edu/Training	_____	_____
F) Employment/Edu/Training Retention	_____	_____
G) Credential Rate	_____	_____
H) OTHER (None of the above)	_____	_____

Attachment 4 – Budget Worksheet

Budget Worksheet

A. Salaries and Wages:

Provide a breakdown of your staff costs by completing the following.

Position/Title	Hourly Rate	Total Hrs. Per Week	Hrs. per Week Charged to WIOA	# Weeks Charged to WIOA	% Devoted to Work-Experience	Total WIOA Cost	Leveraged Funds Contribution

Total Salaries _____

B. Fringe Benefits:

Represents payments other than salaries and wages, made to staff or paid in behalf of or on their account, e.g., pensions, insurance, etc. Important – Government mandated fringe benefit components must be consistent with known or planned tax rates and the bases must be consistent with the ceilings on these. Non- tax generated benefits must be fully supported by your agency’s personnel manual.

Fringe Benefit	% Benefit is of Salaries	Total WIOA Cost	Leveraged Funds Contribution
FICA			
Worker Compensation			
Health Insurance			
Retirement			
Other			

Total Benefits _____

C. Other Line Items:

List your proposed cost for each additional line item wherever applicable. Indicate the total cost proposed for each line item by listing it under the Total WIOA Cost column. Line items paid for by other resources, either in part or in full, should have such costs represented in the Match Contribution column.

Please note that the line items listed below reflect the types of costs that have historically been proposed. You are not limited to these, nor are you required to propose a cost for each one.

		Total Agency Line Item Cost	% of Line Item Charged to WIOA	Total WIOA Cost	Leveraged Funds Contribution
1	Instructional Supplies				
2	Office Supplies				
3	Equipment				
4	Facilities				
5	Communications				
6	Postage				
7	Insurance				
8	Travel				
9	Professional Services				
10	Photocopying				
11	Printing				
12	Needs-Related Payments				
13	Work Experience (youth wages)				
14	Occupational Skills/Training costs				
15	Other				
16	Other				

Total Other Line Items \$ _____

GRAND TOTAL \$ _____ (A+B+C)

LEVERAGED FUNDS CONTRIBUTION (%) \$ _____

Attachment 5 – Fiscal Questionnaire

Fiscal Questionnaire

Is the agency a not-for-profit entity?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is the agency subject to the A-133 Single Audit requirement (Federal funding of \$750,000 or more effective with fiscal years starting January 1, 2015 and forward)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does the agency do its own accounting? If no, indicate the name and address of the accounting firm below.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Name:		
Address:		
Contact Person:		
Phone Number:		
Does the agency have a current financial procedures manual?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, how often is it reviewed and updated?		
Does the agency have a written cost allocation plan? If yes, please submit	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does the agency have an approved Indirect Cost Rate by a cognizant agency? If yes, please submit	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does the agency have a conflict of interest policy?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
How often is a trial balance prepared?		
Accounting System Disbursements/Reconciliation		
Are all disbursements made by check?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are all checks pre-numbered?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Who is authorized to sign checks? Please indicate name and title(s).		
How often is the bank reconciliation prepared?		
Please provide the name and length of engagement.		
Name:		
Length of Engagement:		

Attachment 6 – Statement of Compliance Disclaimer Form

Statement of Compliance and Disclaimer Form

As the authorized signatory official for: _____

I hereby certify:

- That the above-named respondent is legally authorized to submit this application requesting funding under the Workforce Innovation and Opportunity Act and all other funding sources;
- That the above-named respondent does hereby agree to execute all work related to this application in accordance with the Workforce Innovation and Opportunity Act, U.S. Department of Labor, Massachusetts Department of Career Services, Local Workforce Development Board policies and guidelines, and other administrative requirements issued by the State of Massachusetts; and
- That the above named respondent will ensure special efforts to prevent fraud and other program abuses, such as but not limited to, deceitful practices, intentional misconduct, willful misrepresentation, and improper conduct which may or may not be fraudulent in nature; and
- That the above named respondent will abide to all limitations, assurances, and disclaimers listed in the RFP including in Section XI.H.; and
- That the contents of the application are truthful and accurate and the above named respondent agrees to comply with the policies stated in this application and that this application represents a firm request subject only to mutually agreeable negotiations; and that the above named respondent is in agreement that the MassHire Metro South/West Workforce Board reserves the right to accept or reject any proposal for funding; and that the above-named respondent has not been debarred or suspended from receiving federal grants, contracts, or assistance; and that the above-named respondent waives any right to claims against the members and staff of the MassHire Metro South/West Workforce Board.

Typed Name of Authorized Representative

Title of Authorized Representative

Signature of Authorized Representative

Date