



**METRO NORTH
WORKFORCE BOARD**

**REQUEST FOR PROPOSALS FOR
WIOA YOUTH PROGRAM PROVIDERS
IN-SCHOOL AND OUT-OF-SCHOOL PROGRAMS
FOR FISCAL YEAR 2023
(July 1, 2022-June 30, 2023)**

**MASSHIRE METRO NORTH WORKFORCE BOARD
186 ALEWIFE BROOK PARKWAY, SUITE 216
CAMBRIDGE, MA 02138**

**RESPONSE DUE:
Friday, January 28, 2022, 4:00 p.m. EST**

Please submit all questions to RFP@masshiremetronorth.org

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1. INTRODUCTION AND SCHEDULE

A. Introduction

The MassHire Metro North Workforce Board (MNWB) is issuing this request for proposal (RFP) to select providers of the region's Workforce Innovation and Opportunity Act (WIOA) Youth In-School and Out-of-School programs, collectively referred to as the WIOA Youth Program Providers (YPPs). YPPs are different from the Metro North Youth Services Operator, procured separately, that provides some WIOA youth services *in partnership* with the YPPs, as well as other youth programs.

Applicants should identify in their proposal whether they are proposing to serve youth who are In-School, Out-of-School, or both. The selected providers will provide education, employment, and training services to economically disadvantaged youth in the twenty-community region known as the Metro North workforce development area (see Appendix A for regional map). The Metro North region has a culturally diverse client population that includes the following significant service groups: public assistance recipients, limited English speakers, individuals with disabilities, high school dropouts, and offenders.

The selected providers' contracts will start July 1, 2022 and end June 30, 2023. Contracts may be renewed for one additional fiscal year depending on performance.

A copy of the WIOA regulations is available at [HTTPS://www.doleta.gov/WIOA/](https://www.doleta.gov/WIOA/).

B. Schedule

November 17, 2021	Request for Proposals released
December 8, 2021	Bidder's Conference Webinar 2:00pm EST
December 17, 2021	Letters of Intent due by 4:00pm EST <i>A letter of intent is optional, but strongly encouraged</i> Submit to RFP@masshiremetronorth.org
January 7, 2022	Deadline for submission of written questions
January 28, 2022	Proposals due by 4:00pm EST
April 6, 2022	Bidders notified of outcome
Contract start date	July 1, 2022

2. BACKGROUND AND GOVERNANCE

A. Metro North Region

The MassHire Metro North Workforce Board (MNWB) comprises twenty cities and towns in Middlesex and Suffolk Counties serving Arlington, Belmont, Burlington, Cambridge, Chelsea, Everett, Malden, Medford, Melrose, North Reading, Reading, Revere, Somerville, Stoneham, Wakefield, Watertown, Wilmington, Winchester, Winthrop, and Woburn. Incorporated as a 501(c)(3), the MassHire Metro North Workforce Board's mission is to promote and develop a workforce system that is responsive to the needs of business and job seekers resulting in increased economic prosperity in the region and in the Commonwealth. The MassHire Metro North Workforce Board is the fiscal agent for Workforce Innovation Opportunity Act (WIOA) funds and provides Board staffing pursuant to WIOA.

B. 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 (WIA) and is the first legislative reform in sixteen years of the public workforce system. American Job Centers, also known as One-Stop Centers, were established under the Workforce Investment Act of 1998 and now are reauthorized under WIOA. WIOA supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973.

C. Resources

The MassHire Metro North Workforce Board has developed a strategic plan that contains significant information about the region's labor market information and the goals and objectives of the Board, including specifically for youth. Since the information is readily available to bidders, it will not be repeated in this RFP. The July 1, 2016 to June 30, 2020 Local Strategic Plan may be accessed directly on the homepage at masshiremetronorth.org.

For more information on WIOA, the Commonwealth of Massachusetts WIOA policies may be found at <http://www.mass.gov/massworkforce/>. Proposers must be knowledgeable regarding the statutes, regulations, rules and policies for the funding streams. 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/>. Workforce Innovation and Opportunity Act Final Rules Resources can be found at: https://www.doleta.gov/wioa/Final_Rules_Resources.cfm.

D. Areas of Emphasis – Special Initiatives

The MassHire Metro North Workforce Board has outlined five areas for particular emphasis for its WIOA Youth programs.

The five areas for emphasis are:

- 1) Integrated partnerships with businesses in the region's in-demand industries and sectors, as outlined in the MNWB FY17-FY20 Strategic Plan. Those industries are:
 - Advanced Manufacturing
 - Healthcare
 - Information Technology
 - Life Sciences
 - Hospitality
 - Retail
 - Construction/Property Management
 - STEM

Further information on the Metro North region's labor market and the Strategic Plan may be found on the MNWB's website: masshiremetronorth.org.

- 2) College campus-based programming – operate part or all of a youth program on a college campus in order to directly expose enrollees to college and its options.
- 3) Initiatives or program elements that promote/emphasize exposures to “STEM” – Science, Technology, Engineering, and Math occupations. Exposure may include workplace tours, speakers from STEM occupations, career fairs, and other experiential activities.
- 4) Initiatives that support the entry of disabled youth into the workforce.
- 5) Under WIOA, all programs **must** provide work experience; in fact, 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.

Proposals that are able to incorporate any or all of these initiatives into their program designs will be given priority for funding.

3. FUNDING AND PERFORMANCE PERIOD

A. Funding Levels

The WIOA Youth allocation for FY23, the period covered by this RFP, has yet to be determined. Applicants should identify in their proposal whether they are serving youth who are In-School, Out-of-School, or both, the number of proposed slots, and the budget required to deliver services at the proposed service level. By regulation, the MNWB must allocate at least 75% of its WIOA Youth allocation to Out-of-School youth programs. In addition, 20% of the total allocation must be spent on work experience activities.

The number of WIOA Youth Program Providers (YPPs) to be funded through this RFP is not predetermined. The number of YPPs selected and funded depends on various factors, including, but not limited to, number of applicants, quality of proposals submitted, and amount of funding available.

To provide a general sense of existing funding levels, the FY22 WIOA Youth allocation is as follows:

- In-School Programs: 3 programs at a total of \$130,000. Average per slot cost= \$2,700.
- Out-of-School Programs: 3 programs at a total of \$325,328. Average per slot cost= \$6,250.

B. Availability of Funds

For planning purposes, the respondent to this RFP should assume no more than level funding for each program year. As described above, Fiscal Year 2023 amounts are yet to be determined and are subject to change. It is difficult to predict exact funding from year to year and note that federal funding allocations for the State of Massachusetts and the Metro North Workforce Area are expected to decline as our unemployment rate continues to improve. The materials in this RFP are designed to give the bidder a general scope of funding available.

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 MNWB may expand the scope of the contract to include other programs, funding or requirements that the MNWB deems necessary and appropriate.

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

C. Performance Period

The MassHire Metro North 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 MNWB 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 North Workforce Board anticipates funding grant agreements effective July 1, 2022 – June 30, 2023.

D. 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 MNWB 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.

E. Eligible Respondents

The respondent may be a private, for profit or non-profit company or a government agency. Eligible bidders include:

- Institutions of higher education
- 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 lead agency 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 a cost analysis and/or price analysis. The MNWB 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)).

4. SCOPE OF SERVICES- OUT OF SCHOOL PROGRAMS

A. Target Population

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 to provide each youth participant with a recognized credential, personal stability, and an understanding of the requirements of the modern workplace.

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 youth:

- 1) Citizenship/Work Eligible and Selective Service Compliant AND
- 2) Not attending any school (as defined under State law)
- 3) Are age 16 through 24 at the time of enrollment AND
- 4) Are one or more of the following:
 - a) School dropout;
 - b) Youth within the age of compulsory school attendance, but has not attended for at least the most recent complete school year calendar quarter;
 - c) An offender;
 - d) A homeless individual, child, or youth, a runaway, in foster care or aged out of foster care, eligible for assistance under SSA section 477, or in an out-of-home placement;
 - e) Pregnant or parenting;
 - f) A youth who is an individual with a disability;
 - g) HS Grad/HiSet who is a **low-income*** individual and is basic skills deficient or an English language learner;
 - h) A **low-income*** individual who requires additional assistance to enter or complete an educational program or to secure or hold employment.

***The low-income requirement only applies in situations 4(g) and 4(h). In other words, if the youth does not meet any of the other criteria listed in 4(a) through 4(f). A WIOA Youth participant will be considered Low Income if any of the following is true:**

- 1) They are receiving public assistance (TAFDC, EAEDC, SNAP, SSI)
- 2) Their family income is at or below 70% of the Lower Living Standard (LLS), or below the poverty line for a family of one
- 3) They reside in a *High Poverty Area*- The Census Bureau defines a “poverty area” as a census tract where at least 25% of the residents are economically disadvantaged
- 4) They have any of the following barriers:
 - a. Homeless/Runaway (as defined in the McKinney Act)
 - b. Foster Care

5% Rule: Five percent of WIOA youth participants, who would ordinarily be required to be low-income for eligibility, and who meet all other eligibility requirements, may be non low-income. The 5% calculation is based on the percent of youth newly enrolled in the fiscal year (i.e. not carry-ins).

B. Program Design Guidelines

1) Recruitment and Outreach

The Metro North region is a mix of urban and suburban areas, with varied public transportation access. Disenfranchised teens and young adults are generally isolated and may be difficult to reach. Providers under this RFP must be able to market their services and attract youth of the aforementioned target group. The outreach and recruitment efforts of program providers should include, but not be limited to, identifying potentially eligible youth, working with parents and guardians to secure necessary documentation, and communicating with community organizations regarding recruitment efforts. In addition, the location of the services must be accessible enough to attract and retain enrollees over what may prove to be a number of months of participation. Since the responsibility for recruiting and retaining enrollees will rest with the program provider(s), particular attention must be given to these items in the proposal.

2) 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. **Note that (c) and (i), bolded, are required elements in every WIOA Youth program.**

- 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 experiences which include 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, and legal aid.
- 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 of 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.

Description of Follow-Up and Retention

Follow-up and *Retention* are both categories for services that are provided to an enrollee **after the enrollee’s case has been closed and the enrollee has been exited from the Metro North WIOA Youth grant**. Each category comprises two sub-divisions, 1) contact, and 2) the provision of services. *Follow-up* is the overall category that comprises communication with and services to a former enrollee that may assist that enrollee to excel in the world of work. *Retention* also comprises communication and services, but is focused on assisting the former enrollee to retain his/her employment, schooling, or other related outcome. For both, contact must be documented in the statewide MOSES system as well as in the former enrollee’s program case file. These two post-graduate categories emerge from the overall emphasis on a customer’s learning self-reliance and the life-long skills to perform his/her own job searches and maintain his/her employment. Programs should provide a link to career/employment assistance.

WIOA Youth follow-up services must be provided to **all participating youth** for a **minimum of twelve (12) months after exit** from program. Ideally, contact should be provided or at least attempted monthly, and the results should be communicated to the MassHire Metro North Workforce Board who serves as the Youth Services Operator and provides the WIOA Youth Framework Services (see below). YPPs can also utilize the Youth Services Operator for the provision of retention services, as part of their agreements with the Operator. (See “Coordination with the Youth Services Operator” below.)

3) Program Design Framework and Related Services

In the Metro North region, the MassHire Metro North Workforce Board, referred to as the Youth Services Operator, is separate from the WIOA Youth Program Providers and will be charged with providing “program design framework” and related services to the WIOA Youth programs.

For the purposes of this programming, “program design framework management” involves eligibility determination for each applicant; technical assistance training on the delivery of assessments, including the compilation of test results and grade levels and the development of Individual Service Strategy (ISS) plans on each enrollee; the maintenance of case files on enrollees; and the compilation of all pertinent data regarding participants, activities and follow-up for entry into a centralized database. These services will be coordinated with YPPs throughout the fiscal year.

Youth Services Operator staff will interact with YPP staff and it will be the ongoing responsibility of the YPPs to regularly provide necessary enrollee information to Operator staff in a timely fashion in order that the Operator staff can track and document all aspects of services delivered to youth participants.

Agencies that receive awards via this RFP will be expected to develop interactive working relationships with the Youth Services Operator. YPPs and Operator staff will be required to meet regularly, at least quarterly, to review the progress/status of their combined efforts at delivering youth services. When problems or issues arise, YPPs and Operator staff will alert and involve agency directors as well as program staff to resolve them.

4) Coordination with the Youth Services Operator

Tailored Services – In responding to this RFP and developing a program design for FY23, each youth program may negotiate with the Youth Services Operator for the provision of *tailored services* for its program at a negotiated cost, with the resulting design and related costs incorporated into the program design and proposal submission. These negotiated services might include individualized services or any group services to be delivered as an integral aspect of the specific program. Some examples of these services may include: workshops, such as resume development, interviewing skills, etc.; events, such as career fairs or job fairs; or presentations by selected speakers on topics of particular interest and pertinence. Tailored services may also include the development and delivery of work experience services, such as job development or internship development. A YPP will develop a financial agreement with the Operator, either as a subcontractor or as a simple vendor of services. The costs for the Operator services will be reflected in the program budget submitted with the proposal, as a separate line item on the budget, and the prospective Operator services must be clearly outlined within the proposal. If a YPP cannot implement this financial agreement, for technical or organizational reasons, then the negotiated Operator costs will be distributed directly to the designated Operator via a separate contract from the MNWB.

Respondents to this RFP are not required to develop these types of tailored service relationships with the Youth Services Operator, but, as stated earlier, they are encouraged to do so. A proposal will not be penalized if its program design does not include a tailored Operator role.

5) Requirements for Priority Occupation/Sector Targeting

YPPs funded under this RFP must, in conjunction with the Youth Services Operator, arrange to provide exposure activities, e.g., company tours, job shadowing, etc., at employer facilities. Programs must incorporate into their schedules and curricula these kinds of activities and opportunities for enrollees.

Out-of-School Youth programs which include an occupational skills training component are encouraged to focus the training on occupations in the targeted industries as well as in STEM occupations.

6) Limits on Proposed Enrollments & Student-Teacher Ratio

Applicants may propose any slot number, and programs should be designed for the maximum number of slots that can be served with the available funding. However, depending upon assessed labor market demand and proposals submitted, a final award may fund programs at higher or lower enrollment levels than those proposed.

Student-teacher ratios should not exceed 15 to 1. Volunteers to assist regular instructional staff may be utilized to achieve this ratio, if a volunteer program exists which provides training and supervision to volunteers. **Designs that ensure more than one staff person is always available in a classroom are preferred.**

Please note also that the MNWB will give positive consideration to designs that provide comprehensive supports to fewer students in order to maximize the likelihood of student success.

7) Program Hours

Out-of-School Programs must operate for at least 15 hours per week.

8) Start/End Dates and Program Length

Programs should be designed to start on or after July 1, 2022 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.

9) Work Experience

The work experience component outlined in the required program activities may include paid and unpaid employment, job shadowing, or internships. Due to the limited funding for FY23, we strongly encourage applicants to make connections with the private sector and local YouthWorks programs for these items. However, if the proposed design requires subsidized wages, it is expected that wages and fringe benefits (Workman's Compensation and FICA) will be paid directly by the vendor. The wages and fringe costs may be requested and included as program costs in the proposed grant budget or they may be provided on an in-kind match basis. Outline both the work experience staff and related costs requested (and indicate whether provided by the YPP or the Youth Services Operator), as well as requested wage funds or match funding for wages on the budget sheet.

5. SCOPE OF SERVICES- IN SCHOOL PROGRAMS

A. Target Population

In-School Youth programs funded through this RFP must provide a combination of education services, exposure to employment, and additional supportive services in order to provide each youth participant with a recognized credential, personal stability, and an understanding of the requirements of the modern workplace.

An In-School Youth is defined as “a youth who has not attained a high school diploma or equivalent and is attending school on a full-time basis.”

Eligibility criteria for In-School youth:

- 1) Citizenship/Work Eligible and Selective Service Compliant AND
- 2) In School AND 14-21 years old
- 3) Low Income*
- 4) Attending School
- 5) One or more of the following:
 - a. Basic skills deficient
 - b. English language learner
 - c. An offender
 - d. A homeless individual, a runaway
 - e. In foster care (or aged out of foster care), a child eligible for assistance under Sec. 477 of the Social Security Act, or a youth in an out-of-home placement
 - f. Pregnant or parenting
 - g. A youth who is an individual with a disability
 - h. An individual who requires additional assistance to complete an educational program or to secure or hold employment (not more than 5% allowed using this item)

*A WIOA Youth participant will be considered Low Income if any of the following is true:

- 1) They are receiving public assistance (TAFDC, EAEDC, SNAP, SSI)
- 2) Their family income is at or below 70% of the Lower Living Standard (LLS), or below the poverty line for a family of one
- 3) They reside in a *High Poverty Area*- The Census Bureau defines a “poverty area” as a census tract where at least 25% of the residents are economically disadvantaged
- 4) They have any of the following barriers:
 - a. Homeless/Runaway (as defined in the McKinney Act)
 - b. Foster Care
- 5) They are ***in school*** and on a free or reduced lunch program

Specific Grade Focus: In-School YPPs must indicate as part of their design the grade levels of the prospective program enrollees. In general, since a required positive outcome for the program is the attainment of a high school diploma, In-School Youth programs should target high school students who are either in the eleventh or twelfth grade, and no lower, proposing to track them through graduation. This would generally allow for a reasonable amount of time for the student to complete high school.

5% Rule: Five percent of WIOA youth participants, who would ordinarily be required to be low-income for eligibility, and who meet all other eligibility requirements, may be non low-income. The 5% calculation is based on the percent of youth newly enrolled in the fiscal year (i.e. not carry-ins).

B. Program Design Guidelines

1) Recruitment and Outreach

The Metro North region is a mix of urban and suburban areas, with varied public transportation access. Disenfranchised teens and young adults are generally isolated and may be difficult to reach. Providers under this RFP must be able to market their services and attract youth of the aforementioned target group. The outreach and recruitment efforts of program providers should include, but not be limited to, identifying potentially eligible youth, working with parents and guardians to secure necessary documentation, and communicating with community organizations regarding recruitment efforts. In addition, the location of the services must be accessible enough to attract and retain enrollees over what may prove to be a number of months of participation. Since the responsibility for recruiting and retaining enrollees will rest with the program provider(s), particular attention must be given to these items in the proposal.

2) Program Components

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. **Note that (c) and (i), bolded, are required elements of every WIOA Youth program.**

- 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 experiences which include 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, and legal aid.
- 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.
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- m. Labor market Services: Participants receive access to career counseling, career exploration, career awareness, and the use of labor market tools.
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Description of Follow-Up and Retention

Follow-up and *Retention* are both categories for services that are provided to an enrollee **after the enrollee’s case has been closed and the enrollee has been exited from the Metro North WIOA Youth grant**. Each category comprises two sub-divisions, 1) contact, and 2) the provision of services. *Follow-up* is the overall category that comprises communication with and services to a former enrollee that may assist that enrollee to excel in the world of work. *Retention* also comprises communication and services, but is focused on assisting the former enrollee to retain his/her employment, schooling, or other related outcome. For both, contact must be documented in the statewide MOSES system as well as in the former enrollee’s program case file. These two post-graduate categories emerge from the overall emphasis on a customer’s learning self-reliance and the life-long skills to perform his/her own job searches and maintain his/her employment. Programs should provide a link to career/employment assistance.

WIOA Youth follow-up services must be provided to **all participating youth** for a **minimum of twelve (12) months after exit** from program. Ideally, contact should be provided or at least attempted monthly, and the results should be communicated to the Metro North Youth Services Operator, who provides the WIOA Youth Framework Services (see below). YPPs can also utilize the Youth Services Operator for the provision of retention services, as part of their agreements with the Operator. (See “Coordination with the Youth Services Operator” below.)

3) Program Design Framework and Related Services

For FY23, in the Metro North region, the MassHire Metro North Workforce Board will also be the Youth Services operator and provide “program design framework” and related services to the WIOA Youth programs.

For the purposes of this programming, “program design framework management” involves eligibility determination for each applicant; technical assistance training on the delivery of assessments, including the compilation of test results and grade levels and the development of Individual Service Strategy (ISS) plans on each enrollee; the maintenance of case files on enrollees; and the compilation of all pertinent data regarding participants, activities and follow-up for entry into a centralized database. These services will be coordinated with YPPs throughout the fiscal year.

Youth Services Operator staff will interact with YPP staff and it will be the ongoing responsibility of the YPPs to regularly provide necessary enrollee information to Operator staff in a timely fashion in order that the Operator staff can track and document all aspects of services delivered to youth participants.

Agencies that receive awards via this RFP will be expected to develop interactive working relationships with the Youth Services Operator. YPPs and Operator staff will be required to meet regularly, at least quarterly, to review the progress/status of their combined efforts at delivering youth services. When problems or issues arise, YPPs and Operator staff will alert and involve agency directors as well as program staff to resolve them.

4) Coordination with the Youth Services Operator

Tailored Services – In responding to this RFP and developing a program design for FY23, each youth program may negotiate with the Youth Services Operator for the provision of *tailored services* for its program at a negotiated cost, with the resulting design and related costs incorporated into the program design and proposal submission. These negotiated services might include individualized services or any group services to be delivered as an integral aspect of the specific program. Some examples of these services may include: workshops, such as resume development, interviewing skills, etc.; events, such as career fairs or job fairs; or presentations by selected speakers on topics of particular interest and pertinence. Tailored services may also include the development and delivery of work experience services, such as job development or internship development. A YPP will develop a financial agreement with the Operator, either as a subcontractor or as a simple vendor of services. The costs for the Operator services will be reflected in the program budget submitted with the proposal, as a separate line item on the budget, and the prospective Operator services must be clearly outlined within the proposal. If a YPP cannot implement this financial agreement, for technical or organizational reasons, then the negotiated Operator costs will be distributed directly to the designated Operator via a separate contract from the MNWB.

Respondents to this RFP are not required to develop these types of tailored service relationships with the Youth Services Operator, but, as stated earlier, they are encouraged to do so. A proposal will not be penalized if its program design does not include a tailored Operator role.

5) Requirements for Priority Occupation/Sector Targeting

YPPs funded under this RFP must, in conjunction with the Youth Services Operator, arrange to provide exposure activities, e.g., company tours, job shadowing, etc., at employer facilities. Programs must incorporate into their schedules and curricula these kinds of activities and opportunities for enrollees.

6) Limits on Proposed Enrollments & Student-Teacher Ratio

Applicants may propose any slot number, and programs should be designed for the maximum number of slots that can be served with the available funding. However, depending upon assessed labor market demand and proposals submitted, a final award may fund programs at higher or lower enrollment levels than those proposed.

Student-teacher ratios should not exceed 15 to 1. Volunteers to assist regular instructional staff may be utilized to achieve this ratio, if a volunteer program exists which provides training and supervision to volunteers. **Designs that ensure more than one staff person is always available in a classroom are preferred.**

Please note also that the MNWB will give positive consideration to designs that provide comprehensive supports to fewer students in order to maximize the likelihood of student success.

7) Program Hours

In-School programs should be scheduled for no more than 20 hours per week during the summer. During the school year, the schedule of program activities must be appropriate to the target group, but generally should not exceed 15 hours per week.

8) Start/End Dates and Program Length

Programs should be designed to start on July 1, 2022 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, for example, over successive school grade years, if they continue to require assistance and support. Continued contracting for services past one year 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.

9) Work Experience and Summer Component

The work experience component outlined in the required program activities may include paid and unpaid employment, job shadowing, or internships. Due to the limited funding for FY23, we strongly encourage applicants to make connections with the private sector and local YouthWorks programs for these items. However, if the proposed design requires subsidized wages, it is expected that wages and fringe benefits (Workman's Compensation and FICA) will be paid directly by the vendor. The wages and fringe costs may be requested and included as program costs in the proposed grant budget or they may be provided on an in-kind match basis. Outline both the work experience staff and related costs requested (and indicate whether provided by the YPP or the Youth Services Operator), as well as requested wage funds or match funding for wages on the budget sheet.

Work experience may be delivered in the summer or year-round but all In-School YPPs must offer year-round services to program enrollees.

Program providers must present a program of summer activities that will effectively meet the following goals:

- provide a "bridge" between school years;
- enhance the basic education skills of youth;
- encourage school completion or enrollment in supplementary or alternative school programs;
- provide enrollees with exposure to the world of work;
- develop the leadership and citizenship skills of youth; and,
- connect with school to work and/or tech prep programs.

Elements of the summer component should be developed in order to assist the enrollees with the following:

- improvement in school retention and completion;
- improvement in academic performance, including mathematics and reading comprehension; and,
- improvement in employability and work-related skills.

6. PERFORMANCE OUTCOMES, REPORTING AND TRACKING

A. **WIOA Youth Performance Measures**

Under WIOA, achievement of measurable performance outcomes is a critical expectation of the YPPs. The chart below lists the current FY22 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	FY22 Goal
Entered Employment/Edu/Training	Placement in Employment, Education or Training (2 nd quarter after exit)	81.0%
Employment/Edu/Training Retention	Placement in Employment, Education, or Training (4 th quarter after exit)	74.0%
Credential Rate	Credential Rate (within 1 year after exit)	70.5%
Skills Gain	Measurable Skills Gain (real Time measure)	50.0%
Median Earnings	Median Earnings (2 nd quarter after exit)	\$3,600

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

<p>Measurable Skill Gains</p>	<p>The percentage of program participants who, during a program year, are in an education or training program that leads to a recognized postsecondary credential or employment and who are achieving measurable skill gains, defined as documented academic, technical, occupational, or other forms of progress, towards such a credential or employment. Depending on the type of education or training program, documented progress is defined as one of the following:</p> <ol style="list-style-type: none"> 1. Documented achievement of at least one educational functioning level of a participant who is receiving instruction below the postsecondary education level; 2. Documented attainment of a secondary school diploma or its recognized equivalent; 3. Secondary or postsecondary transcript or report card for a sufficient number of credit hours that shows a participant is meeting the State unit's academic standards; 4. Satisfactory or better progress report, towards established milestones, such as completion of OJT or completion of one year of an apprenticeship program or similar milestones, from an employer or training provider who is providing training; or 5. Successful passage of an exam that is required for a particular occupation or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks such as knowledge-based exams.
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B. File Records, Retention and Ownership

Selected respondents must retain, secure and ensure the accuracy of all program files and records, whether related to businesses or participants, in compliance with federal, state, and WIOA requirements. Records must be retained for at least three (3) years after the submittal of the final closeout expenditure report for that funding period. Case files must contain a variety of documentation including, but not limited to: program eligibility, suitability, assessment data; regular updates (minimally every 30 days); progress reports, and case notes. Selected respondents must allow local, state, and federal representatives access to all records, program materials, staff, and participants.

C. Oversight, Evaluation and Planning

The MassHire Metro North Workforce Board will monitor and evaluate selected respondents to determine if youth participants are receiving the most comprehensive, high caliber services. Monitoring is also used to ensure program compliance and evaluate the quality and effectiveness of the service strategies. The MNWB is also required under WIOA to monitor the WIOA YPPs’ annually. Therefore, all program and fiscal records must be maintained locally. External monitoring and evaluation may also be conducted periodically by the U.S. Department of Labor, Massachusetts Department of Career Services and any other agencies that provides funds used by the MassHire Metro North Workforce Board to contract for services in the area’s workforce system.

D. Accessibility and Equal Opportunity

The MassHire Metro North Workforce Board is committed to equal programmatic and physical access to services for all customers. All awardees must ensure equal opportunity to all individuals. No individual in the MassHire Metro North Workforce Board regional area shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any Workforce Innovation and Opportunity Act or other funded programs or activities because of race, color, religion, sex, national origin, age, disability, English proficiency, sexual orientation, political affiliation or belief. All successful bidders are expected to demonstrate full compliance with the Americans with Disabilities Act Amendments Act of 2008 (ADAAA) and all other equal opportunity laws.

7. **SOLICITATION, PROCESS AND TERMS**

A. **Period of Solicitation**

This RFP is being released on November 17, 2021. The deadline to submit a response(s) to the RFP is Friday, January 28, 2022 no later than 4:00 p.m. (EST).

B. **RFP Inquires, Questions and Answers**

The primary mode of communication between the MassHire Metro North Workforce Board and potential bidders will occur via <https://masshiremetronorth.org/about/funding-opportunities/>. Questions and Answers and any RFP amendments will be posted on the website. It is the bidder's responsibility to check the website page frequently to stay apprised throughout the process.

A Bidder's Conference Webinar will be held on December 8, 2021 at 2:00pm EST.

All questions pertaining to the RFP must be received in writing via email at RFP@masshiremetronorth.org. Only those questions directed to this email will be answered. All questions must be received by January 7, 2022. Questions will not be answered over the phone or in person.

C. **Letter of Intent**

Please submit a letter of intent (Attachment A) to the MassHire Metro North Workforce Board by 4:00 pm EST on December 17, 2021 to RFP@masshiremetronorth.org. **Submission of a letter of intent is optional, but strongly encouraged.**

D. **Proposal Review and Evaluation Process**

Applications will be evaluated by a team of reviewers, which may include MassHire Metro North Workforce Board members, Metro North Youth Council members, outside experts, and staff. An entity's failure to submit a complete proposal or to respond in whole or in part to RFP requirements may cause the MassHire Metro North Workforce Board to deem the proposal non-responsive and thus ineligible for review.

The MassHire Metro North Workforce Board review team will conduct an in-depth evaluation of all responsive proposals based upon the criteria herein. Prior to its final funding decision, the MassHire Metro North Workforce Board may also: 1) meet with representatives of the responding entity to discuss the proposed program and budget; 2) identify and/or negotiate program or budget changes the responding entity must make as a condition of funding; and 3) identify other documentation the entity must provide as a condition of funding.

After analyzing all of the above data, the review team will select the successful respondent. Entities that fail to meet the evaluation criteria specified herein, or proposals that do not meet the service needs of youth in this region will not receive further consideration for funding. Failure to meet evaluation criteria can include, but is not limited to, non-responsive language in the submission, failure

to clearly address all areas in the project narrative as required, lack of required documentation, and proposing programs which do not address the specific needs of the population(s) being targeted.

E. Evaluation Criteria

Proposals that do not meet minimum standards will be considered non-responsive. The MassHire Metro North Workforce Board is not required to contract with the entity receiving the highest score as a result of the proposal review process, as more particularly described below.

All proposals will be scored according to the evaluation criteria set forth below. Additional information may be considered by reviewers when scoring proposals such as interviews and questions and answers subsequent to the written proposal.

Criteria	Point Value
Organizational Structure/Capacity/Background	20
Service Strategy	40
Past Performance and Planned Outcomes	20
Budget/Budget Narrative	20
Total Points Available	100

8. SUBMISSION REQUIREMENTS AND INSTRUCTIONS

A. Submittal Procedure and Format

To be considered for funding, applicants must submit their proposal via email to RFP@masshiremetronorth.org. All applicants will receive an email response verifying receipt of the proposal. **Completed RFP responses must be submitted by Friday, January 28, 2022 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. Cover Page**
- 2. Proposal Summary Sheet**
- 3. Partnership Chart (if a partnership application)**
4. Memorandum of Understanding (MOU) with partners (if a partnership application)
5. Narrative Response (No more than 8 pages)
- 6. Budget and Budget Narrative (Excel document)**
7. Organization Chart- showing how the proposed program fits in with the larger organization
8. Resumes or Summaries/Job Descriptions of Key Personnel
- 9. Fiscal Questionnaire**
10. List of Board Members (names, business mailing address, affiliation, e-mail and phone numbers)
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**
- 16. Certificate of Lobbying Activities- if applying for \$100,000 or more (Link to pdf included)**

B. 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

C. Narrative Questions

The narrative response section of the proposal should be no more than 8 pages. If applying for both In-School and Out-of-School, please complete separate narratives for each. The narrative(s) should address the following questions:

1) Organizational Background (20 points)

- Briefly describe your organization and its experience with the provision of education and/or training services to the eligible youth population.
- Indicate the particular 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.

2) Service Strategy (40 points)

- Describe your recruitment and outreach plan to recruit the eligible youth population, including how enrollees will be transported to the proposed location(s) of your services, if applicable.
- 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.
- For In-School programs, as indicated in the "Target Population" section, programs should focus on 11th or 12th grade high school students, unless alternate outcomes will be arranged. Please indicate what grade(s) your program will focus on, explain your decision, what diploma/credential outcomes are planned, and how you will track the enrollees to credential attainment. For Out-of-School programs, identify the number and type of staff, the curriculum areas, and the daily and weekly schedule for the project.
- Describe the education component, the work experience component, the leadership skills component, as well as any other components to the program (e.g. skills training, counseling, priority industries/STEM exposure activities, etc.).
- Indicate (in the program narrative) whether your project will incorporate any of the Metro North special emphasis initiatives outlined at the beginning of the RFP.
- Indicate how the program will develop and deliver mandatory work experience.
- Will the proposed services be in a new program or will they be integrated into an existing program that your agency is already operating?
- Identify the periods of each week to be spent in each component, and identify the specific locations where each component will be provided. Indicate whether summer activities will be different from year-round activities and if so, how.
- How will you 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.

- If you plan to utilize the tailored services of the Youth Services Operator, specifically outline those services, and describe how you propose to integrate those services into your program design. Be sure to include the cost for those services in the Budget Form under the “Contractors” line item.
- Identify the total funds requested and for what items they will be used.

3) Outcomes (20 points)

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 expected as a result of your proposed program, including education credential attainments, increases in Literacy and Numeracy, and job placements or post-secondary education enrollments. For example, how many program completers will obtain high school diplomas or alternative high school diploma? Will they obtain credentials/certificates? What types of jobs will they obtain? How many completers will go on to skills training or post-secondary education? Include this information on the Proposal Summary Sheet.
- Referring to these performance measures, in your narrative 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.

D. Budget Instructions

The budget should be submitted in Excel format utilizing the provided template. If you are applying for both In-School and Out-of-School programs, please fill out a separate budget form for each.

General instructions for completing the budget form:

- 1) “BUDGET SUMMARY” tab- This tab summarizes the figures from the other tabs.
 - a. Fill in organization name in cell B/C/D/E (5).
 - b. Check whether you are applying as an In-School or Out-of-School program in either cell C8 or C9.
 - c. All other fields auto-populate.
- 2) “WITHOUT WORK EXPERIENCE” tab- This tab is the program budget for all activities NOT INCLUDING work experience.
 - a. Salary and Fringe- list each individual staff person and their rate of pay and hours budgeted to the project. For fringe, please list the individual components, i.e. 20% healthcare, 5% disability, etc. under the “Description of use of funds” column.
 - b. Other Program Costs- fill in each line item as necessary.
 - c. Contracted Services- list each third-party contractor and the services they will be providing.
 - d. Indirect Costs- indirect costs can not exceed 10% of Budget Sub-total.
- 3) “WORK EXPERIENCE” tab- Repeat steps 2a-2d for all activities related to Work Experience.

4) "MATCH" tab- Repeat steps 2a-2d for any matching funds.

9. LIMITATIONS, DISCLAIMERS, AND ASSURANCES

A. Limitations

The MassHire Metro North Workforce Board shall not pay for any costs incurred by the applicant agencies in the completion of this RFP. Submission of an RFP does not in any way obligate the MassHire Metro North Workforce Board to award a contract. The MassHire Metro North Workforce Board reserves the right to accept or reject any applications, to negotiate with all qualified sources, or to cancel in part or in its entirety this RFP. The MassHire Metro North Workforce Board reserves the right to correct any error(s) and/or make changes to this solicitation as it deems necessary. The MassHire Metro North Workforce Board may require successful applicants to participate in contract negotiations prior to contract finalization. The MassHire Metro North Workforce Board shall reserve the right to withdraw or reduce the amount of an award or to terminate, with or without cause, any contract entered into as a result of this RFP process.

B. Disclaimers

All contract awards by the MassHire Metro North Workforce Board, pursuant to this RFP, are contingent upon the availability of funds. Respondents are liable for any and all costs incurred prior to final authorization by the MassHire Metro North Workforce Board and the execution of a contract with the MassHire Metro North Workforce Board.

The MNWB also reserves the right to:

- Rescind an award and/or reallocate the funding to another applicant should the successful respondent fail to execute its grant agreement in a timely fashion;
- Increase funding levels for any or all agencies selected pursuant to this RFP, if additional funds become available, based on agency performance, effectiveness and other details;
- Change and amend as necessary its policies or procedures governing the delivery or scope of services described herein;
- Perform an assessment of the risk that any recent, current, or potential litigation, court action, investigation, audit, bankruptcy, receivership, financial insolvency, merger, acquisition, or other event might have on an organization's ability to operate a proposed program.

C. Right to File an Appeal

After the MassHire Metro North Workforce Board completes its review of all proposals submitted in response to this RFP, the MNWB will notify all applicants in writing of the status of their proposal and whether or not they have been selected as a proposed Youth Services Operator. Parties who submit proposals that are not selected as proposed Youth Services Operators may appeal the decision of the MNWB in accordance with the applicable provisions of this RFP. Appeals may only be based upon a claim that the MNWB has failed in any material respect to follow the selection process outlined in this RFP. As stated in the RFP, the MNWB is not obligated to select as a proposed Youth Services Operator a proposal that receives the highest score based upon the application of the proposal review scoring criteria. Proposed Youth Services Operators may be selected based upon a more comprehensive review

and analysis that shall take into account the results of the proposal review scoring criteria, interviews, if conducted, geographic access, and the overall qualifications of the party submitting the proposal. Generalized allegations of impropriety or dissatisfaction with the results of the process are not grounds for appeal.

An unsuccessful bidder who wishes to appeal a decision must file an appeal in writing within 10 business days of the date of MassHire Metro North Workforce Board's notice to unsuccessful proposers. The appeal statement must fully state in writing the grounds for the appeal in detail and shall be based solely upon the alleged failure of the MNWB to follow in any material respect the selection process outlined in this RFP. Appeal request statements must be sent by overnight mail or delivered in person. Appeals of the funding decision may be filed with Chris Albrizio-Lee, Local Complaint Officer MassHire Metro North Workforce Board, 186 Alewife Brook Parkway, Suite 216, Cambridge, MA 02138.

If an appeal is filed in accordance with the requirements of this RFP, the Complaint Officer shall proceed as follows:

- The Complaint Officer shall make a written determination within twenty (20) days of receipt of the appeal.
- The Complaint Officer may choose to make a determination based solely on the information included in the case file or conduct further investigation before issuing a written determination.
- If the Complaint Officer has made a written request to the appellant (or the appellant's authorized representative) for additional information, the twenty (20) day period does not begin until the requested information has been received by the Complaint Officer. If the Complaint Officer is unable to contact the appellant for the purposes of obtaining additional information needed to resolve an appeal, a written request for information must be sent via certified mail or through some other form of communication where receipt can be verified. If an appellant does not respond, the Complaint Officer must inform the appellant in writing that the matter is considered resolved and the appeal denied.
- The Complaint Officer may also choose to resolve the appeal by convening a local hearing. Only the Complaint Officer or the authorized Complaint Officer backup may preside at a local complaint hearing. If the Complaint Officer deems that a hearing is necessary, the Complaint Officer will notify the parties (in writing) that the matter has been scheduled for a formal hearing. The notice must inform the parties of certain conditions of the hearing process that include:
 - The date, time and location of the hearing;
 - Instruction that the Complaint Officer will conduct and regulate the course of the hearing to assure full consideration of all relevant issues and that actions necessary in order to ensure an orderly hearing are followed; and
 - Instruction that the Complaint Officer must rule on the introduction of evidence* and afford the parties to present, examine and cross-examine witnesses.

* For clarity, any hearing conducted by the Complaint Officer is an administrative hearing that is not conducted in the same manner as a judicial hearing.

Technical rules of evidence do not apply. It is up to the Complaint Officer to follow principles and procedures that are designed to assure credible evidence that can be tested through cross-examination.

- The Complaint Officer's written determination shall include a specific reference to the appellant's right to appeal the written determination, including the requirement that any appeal by the appellant of the Complaint Officer's written determination must be submitted for a state

level appeal and/or hearing in writing within ten (10) business days **of receipt of the local determination made by the Complaint Officer.**

Decision of the Board

If the Complaint Officer decides in favor of the appellant, the Department of Career Services, in the exercise of its authority pursuant to the Uniform Circular 2.CFR 200 and as designated State Work Force Agency and overseer of the Massachusetts Workforce Development System, designates the following options as sole remedies in the event an appeal is decided in favor of the appellant:

- MNWBid the procurement of the Youth Services Operator in compliance with the requirements of WIOA, the Metro North Procurement Rules, and Department of Career Services policy (101.DCS 03-105); or
- Re-panel an entirely new group of raters and bid reviewers representative of the MassHire Metro North Workforce Board Board and business partners as new reviewers of the original bid proposals/documents (only) and render a decision accompanying by full supporting documentation.

Right to State-Level Appeal

If the local Complaint Officers determination issued to the appellant *does not* resolve the complaint to the satisfaction of the appellant, the appellant may request a state-level appeal and/or formal appeal hearing in writing within 10 business days of the date of the denial. The request for appeal and/or formal appeal hearing must be sent to:

Office of Director
Massachusetts Department of Career Services
Charles F. Hurley Building
19 Staniford Street, 4th Floor
Boston, MA 02114

If the appellant chooses to request an appeal without specifically requesting an appeal hearing, the State Board, or its designee (Authorized State Official - ASO), may decide to either make a determination based solely on the information included in the case file or conduct further investigation and issue a written determination without scheduling a formal hearing.

In either case, the State Board/ASO must submit a written determination to the appellant within 30 days of receipt of the original appeal request or 30 days after having received additional information from further investigation or 30 days after a formal hearing request. If the State Board/ASO has made a written request for information to the appellant or the appellant's authorized representative, and they do not respond within the given time frame, the appeal is considered resolved.

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

Formal Hearing Process

The notice must inform the parties of the following conditions of the hearing process:

- The date, time and location of the hearing.
- Instruction that the State Board/ASO will conduct and regulate the course of the hearing to assure full consideration of all relevant issues and that actions necessary to ensure an orderly hearing are followed.
- Instruction that the State Board/ASO must rule on the introduction of evidence* and afford the parties the opportunity to present, examine, and cross-examine witnesses.

* For clarity it must be noted that an administrative hearing is not the same as a Court of Law. Technical rules of evidence *do not apply*. It is up to the State Board/ASO to follow principles and procedures that are designed to assure credible evidence that can be tested through cross-examination.

In conjunction with the hearing process the State Board/ASO:

- May decide to make a determination based on the information included in the case file or investigate further prior to the formal hearing.
- May decide to conduct a hearing on more than one appellant if the issues are related.
- May permit (at his/her discretion) the participation of interested parties (*amicus curae*) with respect to specific legal or factual issues relevant to the complaint/appeal.
- May choose to conduct the hearing at a single location convenient to all parties (preferred) or, if that would represent a hardship for one or more parties, the State Hearing Official may elect to conduct the hearing by a telephone conference call.
- Must conduct the hearing *and* issue a written determination to the appellant, the respondent and any other participating interested parties within 30 days from the date the hearing was requested. The State Board/ASO's written determination must include:
 - the results of the State level investigation;
 - conclusions reached on the appeal;
 - an explanation as to why the decision was upheld or not upheld;

Decision of State Board

Should the state board decide in favor of the appellant, in the exercise of its authority, the Massachusetts Workforce Development Board (MWDB) will remand decisions on appeals of the Lead Operator of Youth Services selections to the Department of Career Services for further action as the overseer of the Massachusetts Workforce Development System.

The Department of Career Services (DCS), in the exercise of its authority pursuant to the Uniform Circular 2.CFR 200 and as designated State Workforce Agency (SWA) and overseer of the Massachusetts Workforce Development System, designates the following local options as remedies to appeal orders remanded by the Massachusetts Workforce Development Board to DCS for Action:

- Re-bid the procurement of the Youth Services operator in compliance with the requirements of WIOA and MNWB's procurement rules
- Re-panel an entirely new group of rates and bid reviewers representative of the WIOA MNWB and business partners as new reviewers of the original bid proposals/documents and render a decision accompanied by full supporting documentation.

A decision under this state appeal process is final and may not be appealed to the U.S. Secretary of Labor. In the absence of a timely and properly submitted written protest, no party responding to this RFP shall be eligible for any remedy.

D. Disallowed Costs and Cancellations

Successful bidders must accept liability for all aspects of any Workforce Innovation and Opportunity Act program and other state and federal programs conducted under contract with the MassHire Metro North Workforce Board. Successful bidders will be liable for any disallowed costs or illegal expenditures of funds or program operations conducted. The MassHire Metro North Workforce Board reserves the right to cancel or alter an award if new state or federal regulations or policy makes it necessary to change the program purpose or content substantially, or to prohibit such a program.

E. Contracting

The contract award will not be final until the MassHire Metro North Workforce Board and the bidder have executed a mutually satisfactory contractual agreement. No program activity may begin prior to the MassHire Metro North Workforce Board approval of the award and execution of an award letter and/or contractual agreement between the successful bidder and the MassHire Metro North Workforce Board. Reductions in the funding level of any contract resulting from this solicitation process may be considered during the contract period when a bidder fails to meet expenditure, participant, and/or outcome goals specified in the contract or when anticipated funding is not forthcoming from federal or state governments. The MNWB reserves the right to determine both the number and the funding levels of contracts finally awarded. Such determination will depend upon overall fund availability and other factors arising during the proposal review process.

F. Cost and Negotiations

The MassHire Metro North Workforce Board reserves the right to reject any or all proposals received and to negotiate with any and all offers on modifications to proposals. Bids submitted which are over the maximum amount of funds specified for this RFP will be rejected. The proposal warrants that the costs quoted for services in response to the RFP are not in excess of those that would be charged any other individual for the same services performed by the bidder.

G. Modification of Contracts

Any contract awarded pursuant to this RFP may be unilaterally modified by the MassHire Metro North Workforce Board upon written notice to the contractor under the following circumstances:

1. Contractor fails to meet performance and service expectations set forth in the contract, or
2. The federal or state government increases, reduces or withdraws funds allocated to the MassHire Metro North Workforce Board, which impact services solicited under this RFP, or

3. There is a change in federal or state legislation and/or their regulations, local laws, or applicable policies and procedures.

H. Assurances and Certifications

By signing the Statement of Compliance and Disclaimer Form in Attachment F, the applicant agrees to the following assurances and certifications:

The authorized representative agrees to comply with all applicable State and Federal laws and regulations governing the Workforce Innovation and Opportunity Act, Local Workforce Development Boards, and any other applicable laws and regulations. The authorized representative certifies that the proposing organization possesses legal authority to offer the attached proposal. A resolution, motion or similar action has been duly adopted or passed as an official act of the organization's governing body authorizing the submission of this proposal.

In addition, the authorized representative assures, certifies and understands that: Workforce Innovation and Opportunity Act (WIOA) recipients are obligated to maintain the following assurance for the period during which WIOA Title I financial assistance is extended. Each request for proposal, proposal and application for financial assistance under WIOA Title I shall contain the following assurances.

"As a condition to the award of financial assistance from the Department of Labor under Title I of WIOA, the recipient assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

Section 188 of the WIOA, which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA Title I financially assisted program or activity; Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the bases of race, color or national origin; Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities; the Age Discrimination Act of 1975, as amended, which prohibits discrimination on the bases of age; and Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs."

The recipient also assures that it will comply with WIOA implementing regulations and all other regulations implementing the laws listed above. This assurance applies to the recipients operation of the WIOA Title I financially assisted program or activity, and to all agreements the recipient makes to carry out the WIOA Title I financially assisted program or activity. The recipient understands that the United States has the right to seek judicial enforcement of this assurance.

Debarment, Suspension, and Other Responsibility Matters: This certification is required by the Federal Regulations, implementing Executive Order 12549, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85), Department of Health and Human Services (45 CFR Part 76).

By signing the Statement of Compliance and Disclaimer Form the applicant certifies that neither it nor its principals:

- (1) Are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
- (2) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or Local) transaction or contract under a public transaction, violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (3) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity with commission of any of the offenses enumerated in Paragraph (2) of this section; and
- (4) Have not within a three-year period preceding this application had one or more public transactions terminated for cause or default.

Nondiscrimination: By signing the Statement of Compliance and Disclaimer Form the applicant certifies that it shall comply with the nondiscrimination provisions outlined in the WIOA of 2014 including Title I, Sec. 188.

Conflict of Interest: All applicants will disclose to the MassHire Metro North Workforce Board if there is a:

- (1) Manager, employee or paid consultant of the Respondent is a member or employee of the MNWB;
- (2) Manager or paid consultant of the Respondent is married to a member or employee of the MNWB;
- (3) Member of the MNWB, or an employee of the MNWB, owns or has any control in the Respondent's organization;
- (4) A spouse of a member of the MNWB, or employee of the MNWB receives compensation from Respondent for lobbying activities;
- (5) Respondent has disclosed within the proposal response any interest, fact or circumstance which does or may present a potential conflict of interest;
- (6) Should Respondent fail to abide by the foregoing covenants and affirmations regarding conflict of interest, Respondent shall not be entitled to the recovery of any costs or expenses incurred in relations to any contract with the MNWB and shall immediately refund the MNWB any fees or expenses that may have been paid under the contract and shall further be liable for any other costs incurred or damages sustained by the MNWB relating to that contract.

Lobbying: This certification is required by the Federal Regulations, Implementing Section

1352 of the Program Fraud and Civil Remedies Act, Title 31 U.S. Code for the Department of Agriculture (7 CFR Part 3018), Department of Labor (29 CFR Part 93), Department of Education (34 CFR Part 82), Department of Health and Human Services (45 CFR Part 93).

Drug-Free Workplace: This certification is required by the Federal Regulations, Implementing Section 5150-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701; for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Part 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

By signing the Statement of Compliance and Disclaimer Form the applicant certifies that it shall provide a drug-free workplace by:

- (1) Publishing a policy statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;
- (2) Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the Contractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug abuse violations in the workplace;
- (2) Providing each employee with a copy of the Contractor's policy statement;
- (4) Notifying the employees in the Contractor's policy statement that as a condition of employment under this contract, employees shall abide by the terms of the policy statement and notifying the Contractor in writing within five (5) days after any conviction for a violation by the employee of a criminal drug statute in the workplace;
- (5) Notifying the MNWB within ten (10) days of Contractor's receipt of a notice of a conviction of an employee; and,
- (6) Taking appropriate personnel action against an employee of violating a criminal drug statute or require such employee to participate in drug abuse assistance or a rehabilitation program.

These certifications are material representations of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction.

WIOA Sec. 188 29 CFR Part 38 Discrimination Against Participants: If the Secretary determines that any recipient under WIOA Title I has discharged or in any other manner discriminated against a participant or against any individual in connection with the administration of the program involved, or against any individual because such individual has filed any complaint or instituted or caused to be instituted any proceeding under or related to WIOA Title I, or has testified or is about to testify in any such proceeding or investigation under or related to WIOA Title I, or otherwise unlawfully denied to any individual a benefit to which that individual is entitled under the provision of WIOA Title I or the Secretary's regulations, the Secretary shall, within 30 days, take such action or order such corrective measures, as necessary, with respect to the recipient or the aggrieved individual, or both.

WIOA Sec.188 (a):

- (1) **Federal financial assistance.** For the purpose of applying the prohibitions against discrimination on the basis of age under the Age Discrimination Act of 1975 (42 U.S.C. 6101et seq.), on the basis of disability under section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), on the basis of sex under Title IX of the Education Amendments of 1972 (20 U.S.C. 1681et seq.), or on the basis of race, color or national origin under Title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d et seq.), programs and activities funded or otherwise financially assisted in whole or in part under this Act are considered to be programs and activities receiving Federal financial assistance.
- (2) **Prohibition of discrimination regarding participation, benefits and employment.** No individual shall be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with, any such program or activity because of race, color, religion, sex (except as otherwise permitted under Title IX of the Education Amendments of 1972), national origin, age, disability, or political affiliation or belief.
- (3) **Prohibition on assistance for facilities for sectarian instruction or religious worship.** Participants shall not be employed under WIOA Title I to carry out the construction, operation, or maintenance of any part of any facility that is used or to be used for sectarian instruction or as a place for religious worship (except with respect to the maintenance of a facility that is not primarily or inherently devoted to sectarian instruction or religious worship, in a case in which the organization operating the facility is part of a program or activity providing service to participants).
- (4) **Prohibition on discrimination on basis of participant status.** No person may discriminate against an individual who is a participant in a program or activity that receives funds under WIOA Title I, with respect to the terms and conditions affecting, or rights provided to, the individual, solely because of the status of the individual as a participant.
- (5) **Prohibition on discrimination against certain non-citizens.** Participation in programs and activities or receiving funds under WIOA Title I shall be available to citizens and nationals of the United States, lawfully admitted permanent resident aliens, refugees, asylum seekers, and parolees, and other immigrants authorized by the Attorney General to work in the United States.

Section 188 (3) WIOA Title I funds may not be spent on the employment or training of participation sectarian activities. Further, the undersigned applicant certifies that it shall comply with the provisions outlined by the U.S. Department of Health and Human Services (45 CFR 80 and 84).

With regard to Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), the provider agrees to comply with the implementing regulations that require that each program of training services, when funded in all or in part with federal funds, shall be accessible to qualified individuals with disabilities. The provider further agrees to meet all applicable requirements regarding facility access.

By signing, the applicant certifies that it will comply with all other regulations implementing the laws cited above. This assurance applies to the applicant's operation of the WIOA Title I financially assisted program or activity, and to all agreements, the applicant makes to carry out the WIOA Title I financially assisted program or activity.

Documentation of Financial Stability:

Signing the Statement of Compliance and Disclaimer Form certifies that the applicant shall comply with the provisions of Sec. 122 of the Workforce Innovation and Opportunity Act of 2014.

Where the prospective recipient of federal assistance funds is unable to certify to any of the statements in this certification, such prospective recipient shall attach an explanation to this certification.

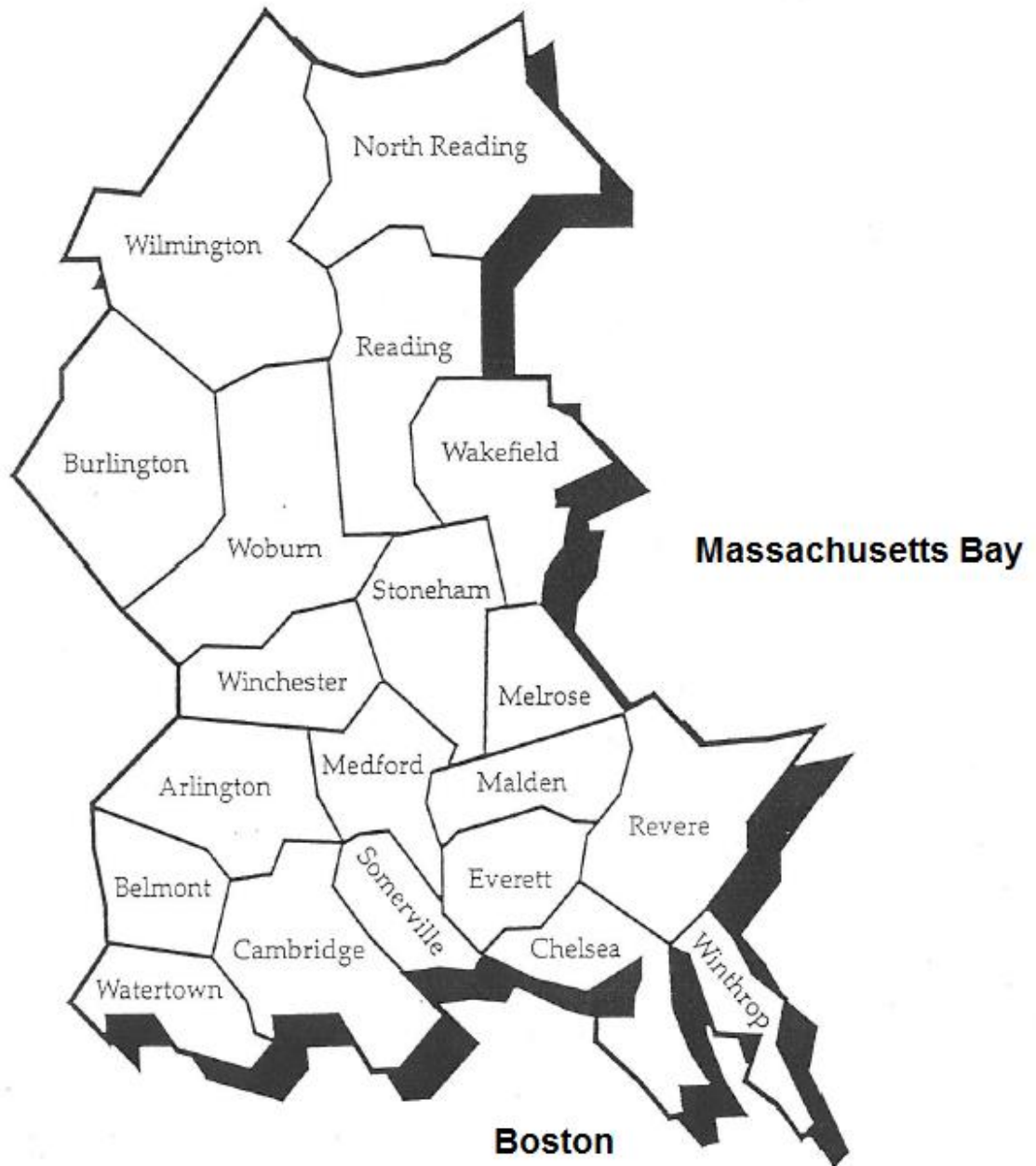
Signing the Statement of Compliance and Disclaimer Form certifies that the statements above pertaining to Debarment, Suspension and Other Responsibility Matters; Nondiscrimination; Conflict of Interest; Education Standards and Procedures; Documentation of Financial Stability and Reporting Requirements are true and correct as of the date of submission. This does not preclude the MassHire Metro North Workforce Board from requiring additional assurances as part of the local application requirements.

Further, the Authorized Representative acknowledges that if the information given to the MNWB by the applicant causes harm to a third party, then applicant will be held liable for any MNWB action resulting from reliance on that information.

10. APPENDIX

A. Metro North Regional Map

Metro North Regional Map



11. ATTACHMENTS

- A. Letter of Intent**
- B. Cover Page**
- C. Proposal Summary Forms**
- D. Partnership Form**
- E. Fiscal Questionnaire**
- F. Statement of Compliance and Disclaimer Form**
- G. Certificate of Lobbying Activities**

Attachment A

Letter of Intent to Bid on Metro North WIOA Youth Provider Request for Proposals

Submit this letter to the MassHire Metro North Workforce Board by 4:00pm EST Friday, December 17, 2021 to RFP@masshiremetronorth.org. **Submission of a letter of intent is optional, but strongly encouraged.**

Date Submitted: _____

Submitting for (Please Check):

____ In School ____ Out of School ____ BOTH (In School and Out of School)

Name of Lead Organization: _____

Address: _____

Contact Person: _____

Telephone: _____ E-mail: _____

Collaborating Organizations (if any):

Organization Name: _____

Organization Name: _____

Organization Name: _____

Organization Name: _____

Organization Name: _____

Attachment B

Cover Page

Legal Name Of Applicant Agency			
Number of Years In Business			
FEIN Number			
DUNS Number			
Type of Organization (check all that apply)	<input type="checkbox"/> Institution of higher education <input type="checkbox"/> Non-traditional public school <input type="checkbox"/> Consortium of public agencies <input type="checkbox"/> Community organization <input type="checkbox"/> Labor organization	<input type="checkbox"/> Private for Profit <input type="checkbox"/> Not-for-Profit <input type="checkbox"/> Government Agency <input type="checkbox"/> Business <input type="checkbox"/> Business association	
Addresses of Service Location – This is the location where the services described in this application will be provided.	Addresses:		
Principal of Agency – CEO/Executive Director/President	Name		
	Title		
	Address		
	Email Address		
	Phone		
Programmatic Contact Person	Name		
	Title		
	Address		
	Email Address		
	Phone		
Fiscal Contact Person	Name		
	Title		
	Email Address		
	Phone		
Total Amount Requested	\$		

Attachment C1

RFP TITLE: WIOA IN SCHOOL Youth -- Metro North

Fiscal Year 2023

▪ 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 6/30/23 :	_____	<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 6/30/23 :	_____	_____
<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 E

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 F

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 North 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 North Workforce Board.

Typed Name of Authorized Representative

Title of Authorized Representative

Signature of Authorized Representative

Date

Attachment G

Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) – Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal entity. Such disclosures are forwarded from tier to tier up to the grantee or sub-grantee/non-Federal entity.

Complete and attach the Certificate of Lobbying Activities (SF-LLL):

<https://www.whitehouse.gov/sites/default/files/omb/grants/sfillin.pdf>