

**Request for Proposals for the**

**Senator Kenneth J. Donnelly**

**Workforce Success Grants for Training & Placement / Advancement Programs**

***Funded through the***

***Workforce Competitiveness Trust Fund***

***FY’20 Appropriation***

**Issued by**

**Commonwealth Corporation**

**RESPONSES DUE:** April 9, 2020 by 5:00 PM

Upload electronic submission to the following link:

[**https://commcorp.tfaforms.net/328802**](https://commcorp.tfaforms.net/328802)

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**Workforce Competitiveness Trust Fund**

**FY’20 APPROPRIATION**

**REQUEST FOR PROPOSALS**

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**Workforce Competitiveness Trust Fund: FY’20 APPROPRIATION**

**REQUEST FOR PROPOSALS**

Section One: Overview of Grant Initiative Goals and Structure

1. ***About the Funding Source:*** The Workforce Competitiveness Trust Fund (WCTF) was established through economic stimulus legislation passed by the Massachusetts Legislature in 2006. The Massachusetts Legislature established the WCTF with two goals in mind:

* To improve the competitive stature of Massachusetts businesses by improving the skills of current and future workers, and
* To improve access to well-paying jobs and long-term career success for all Massachusetts residents, especially those who experience structural, social, and educational barriers to employment success.

The Workforce Competitiveness Trust Fund invests in demand-driven programs designed by industry sector partnerships that train and place unemployed and underemployed workers. The purpose of the Fund is to support the development and implementation of employer and worker-responsive programs to enhance worker skills, incomes, productivity, and retention, and to increase the quality and competitiveness of Massachusetts businesses. WCTF programs serve people across the Commonwealth whose life experiences and circumstances make it difficult for them to succeed in employment without targeted support. They include individuals who are underemployed and rely on aid from public benefits to support their families, individuals who have been disconnected from the workforce for a long period, and people who have not been able to complete formal schooling. Other participants may face barriers to work due in part to not speaking English as their first language, past involvement with the criminal justice system, or health problems such as a disability or substance use history.

This grant initiative is funded through an appropriation in the Fiscal Year 2020 State Budget (line item 7002-1075). The grant initiative is funded by the Workforce Competitiveness Trust Fund and administered by Commonwealth Corporation on behalf of the Executive Office of Labor and Workforce Development. In 2018, the Massachusetts Legislature voted to rename grant awards from the WCTF in memory of the late Senator Kenneth Donnelly, who was a steadfast champion of promoting workforce opportunities in the Commonwealth, especially for people who might lack a pathway to economic stability.

In this spirit, we seek to foster sector partnerships that are powered by local organizations who possess deep expertise and aim to uplift people of all backgrounds. The WCTF model enables community organizations to build and sustain effective partnerships with employer partners and the public workforce system while striving to incorporate more equitable and innovative practices that lead to increased economic mobility for more people in the Commonwealth.

1. ***About the Grant Initiative Goals:*** *The Workforce Competitiveness Trust Fund (WCTF) FY’20 Appropriation* is designed to fund **training and placement** or **training and advancement** programs in occupational priorities identified through the Regional Workforce Skills Planning Initiative regional blueprint process[[1]](#footnote-1) except for Advanced Manufacturing and Healthcare occupations, which the Workforce Skills Cabinet has allocated separate resources to address. Commonwealth Corporation seeks to fund proposals from qualified partnerships that propose to implement one of the two following options:

* ***Training and Placement Program [Option A]*:** for partnerships proposing to deliver cohort-based, occupationally focused training and placement programs to unemployed and/or underemployed individuals working outside the target industry, with a goal to place them in unsubsidized employment in the target occupation upon completion of training. We have set a target wage floor of $14.25 per hour.
* ***Training and Advancement Program [Option B]:*** for partnerships proposing to deliver cohort-based, occupationally focused training and advancement programs to underemployed workers currently working in the target sector. This option seeks to provide opportunities for entry-level workers to advance to a new job within their current employer that is full-time and provides wage growth and career growth.

1. ***Target Populations:*** Grant funds may be used to train Massachusetts residents who are un/underemployed. Please see Section 3 for more information.
2. ***Funding Availability*: ~**$2 million is available for this grant program. Please see Section 5 for more information.
3. ***Match Requirement*:** Awardees will be required to provide a 30% match of total awarded funds. Match contributions may be cash or in-kind. Please see Section 5 for more information.
4. ***Duration of Contract(s)*:** Contracts will be issued for a maximum duration of up to two years unless the duration of the training required for entry into the target occupation requires additional time; in those specific cases, applicants may request up to a three-year grant duration.
5. ***Payment:*** Funds will be disbursed on a cost-reimbursement basis. We anticipate that lead applicants for each partnership will submit one invoice each month using the required invoice template provided by Commonwealth Corporation. Partnerships will only be reimbursed for expenses incurred during the period of the contract. Lead applicants for each partnership will be required to maintain and submit, upon request, back-up documentation for expenses and match contributions.
6. ***Application Deadline*:** Applications are due on April 9, 2020 by 5:00 PM. We do not require a letter of intent to apply; however, we do encourage interested parties to sign-up for our Q&A list in order to be notified of relevant updates and clarifications. Questions about this RFP will be accepted via email to Anthony Britt at abritt@commcorp.org from February 25, 2020 through April 2, 2020. Please see Section 6 for more information.
7. ***Schedule:***

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Request for Proposals Released | February 27, 2020 |
| Deadline to Submit Written Questions | April 2, 2020 |
| All Answers to Questions Posted Online | April 6, 2020 |
| Responses (Proposals) Due | April 9, 2020 by 5:00 PM |
| Applicants Notified of Status (Anticipated) | Late June 2020 |
| Anticipated Contract Start Date | July 1, 2020 (tentative) |
| Anticipated Contract End Date | June 30, 2022/23 (tentative) |

**The following chart provides an overview of key elements of both options. Please see Sections 2 and 3 for more information about training design requirements:**

|  |  |  |
| --- | --- | --- |
|  | **Pipeline Training and Placement Program**  **[Option A]** | **Training and Advancement Program**  **[Option B]** |
| ***Maximum Grant Award*** | Up to $250,000 for a 2-year grant OR  Up to $350,000 for a 3-year grant in certain qualifying cases.[[2]](#footnote-2) | Up to $250,000 for a 2-year grant OR  Up to $350,000 for a 3-year grant in certain cases.[[3]](#footnote-3) |
| ***Target Population*** | To train and place un/underemployed Massachusetts residents into occupation(s) that are in demand by employers in a specific region. | To train and secure the advancement of underemployed incumbent workers in target occupations that are identified as a high priority. |
| ***Target Occupation*** | An occupation within the information technology cluster or another sector that is identified as critical or priority in the regional blueprint for the lead applicant’s region.  *Note: Due to existing funding for manufacturing workforce development programs through the Advanced Manufacturing Training Program and upcoming funding for healthcare grants, we will not be accepting proposals targeted towards occupations in the manufacturing or healthcare sectors. Commonwealth Corporation plans to release another RFP in March 2020 to support partnerships who intend to run workforce programs focused on healthcare occupations. Up to $2.5 million will be available for this healthcare-focused RFP.* | |
| ***Baseline Partnership Requirements*** | Minimum of two employers that have operations in Massachusetts and demonstrated vacancies in the target occupation who are interested in using the program to fill their vacancies by hiring new individuals. | Minimum of two employers that have operations in Massachusetts and have demonstrated vacancies in the target occupation who are interested in identifying and supporting current employees to participate in training and secure advancement at the conclusion. |
| Local MassHire Workforce Board, one local MassHire Career Center, and the Union, if applicable. | |

Section Two: Eligible Lead Applicants and Partners

1. ***Eligible Lead Applicants*:** The following organizations are eligible to apply as lead applicants on behalf of a partnership:

* Community-based organizations, including adult basic education providers
* Employers with operations in Massachusetts and that employ Massachusetts residents in the proposed target occupation
* Employer associations
* Higher education institutions
* Labor organizations
* Local workforce development entities
* Local workforce boards
* Nonprofit education, training or other service providers
* One-stop career centers
* Vocational education institutions

*An organization may not be the lead applicant for more than one application.*

*An organization may propose to participate as partners on more than one application.*

1. ***Lead Applicant Responsibilities:*** Lead applicants must:

* Have a commitment to work collaboratively with Commonwealth Corporation to ensure that the program meets participants’ needs and achieves planned outcomes.
* Convene the partners to achieve the overall project goals, including, but not limited to, coordinating the design of the program, developing an appropriate budget, negotiating agreement of the program performance management measures, developing and overseeing the effective implementation of the training program and coordinating all program activities.
* Collect and report all required data and participate in the overall evaluation of the program.
* Have operational and fiscal capacity to manage public funds.

1. ***Required Partnership Members and Qualifications:*** Lead applicants must ensure they have all the partners needed to reach and support their target population in securing employment in their target occupation or advancing to their target occupation. Collectively, the members of the partnership must have demonstrated experience and success in providing occupationally focused training and placement and/or advancement programming for un/underemployed people, including education, training, and employment support services.

Each partner’s commitment, role, and anticipated activities must be demonstrated either through a signed Memorandum of Agreement (MOA) among all partners or through the submission of separate letters of commitment. We do not mandate a specific format; however, the strongest applications will include clear commitments, outline roles and responsibilities, and articulate a shared stake in the success of the program among partners. We are looking for meaningful language that is tailored to the details of the proposal and includes a sufficient level of detail as opposed to a generalizable statement.

* + ***Employers:*** partnerships **must include** a **minimum of two businesses** with operations in Massachusetts and that employ Massachusetts residents in the target occupation(s). Successful applicants will demonstrate that they have relationships with local businesses committed to providing placements or advancement opportunities for participants.
    1. **Option A:** Selected business partners need to have demonstrated vacancies and/or hiring needs for workers in the proposed target occupation and a commitment to a candidate-sourcing strategy that includes recruiting and training members of the proposed target population as a solution to meet this demand. ***These businesses must sign a MOA or letter***.
    2. **Option B:** Selected business partners need to have demonstrated vacancies and/or hiring needs for workers in the proposed target occupation and a commitment to identifying and supporting current employees to participate in training and secure advancement (including, but not limited to, wage growth) at the conclusion of the program. ***These businesses must sign a MOA or letter***.

*Please note that if workers in the proposed target occupation at participating businesses are covered by a collective bargaining agreement, the union that represents the workers must also demonstrate partnership through either a signed Memorandum of Agreement or Letter of Commitment.*

* ***MassHire Workforce Board:*** partnerships **must include** their local workforce board in a capacity that complements the overall structure and strategy of the proposed program. Workforce board staff have substantial knowledge about business demand for workers in their region. They can also identify opportunities to leverage local publicly-funded workforce system capacity. Many MassHire Workforce Boards have staff with experience in designing and managing strategic sector-based initiatives and in convening and facilitating industry sector partnerships. ***This partner must sign a MOA or letter***. Applicants can access a list of MassHire Workforce Boards at the following link: https://www.mass.gov/service-details/connect-with-your-local-masshire-workforce-board
* ***MassHire Career Center:*** partnerships **must include** their local career center in a capacity that complements the overall structure and strategy of the proposed program. MassHire Career Centers provide job search assistance to large numbers of job seekers each year and may be able to assist with participant recruitment and selection as well as job search preparation. They also have relationships with regional employers and may be a resource for supporting job development and placement activities. ***This partner must sign a MOA or letter***. Applicants can access a list of MassHire Career Centers at the following link: <https://www.mass.gov/how-to/find-a-masshire-career-center>
* ***Other Partnership Members:*** Successful applicants will clearly demonstrate their organization’s core competencies and identify areas in which they may leverage relationships with other organizations in their community or region in order to strengthen their programming and/or achieve regional efficiencies of scale.

Applicants are encouraged to identify additional partners that are critical to the sector and success of the target population and that will add value to the partnership. Examples of such partners include, but are not limited to, local service offices of public agencies, employer associations, labor organizations, institutions of higher education and vocational technical education institutions, housing agencies, and non-profit education, training or other service providers. ***These partners must sign a MOA or letter***.

Section Three: Training Program Design Requirements

**All applicants must propose to either:**

**Option A)** deliver a program to train and **place** un/underemployed participants, [as outlined in this section](#_Option_A:_Pipeline),

**OR**

**Option B)** deliver a program to support the training and **advancement** of un/underemployed participants, [as outlined in this section](#_Option_B:_Pipeline)

#### Option A: Training and Placement Program Design Requirements

1. ***Option A Target Sector / Occupation:*** Applicants must provide cohort-based job training, placement, and support services that prepare individuals to meet business’ skill and work-readiness requirements for an in-demand occupation(s). Applicants may either propose to train individuals for an occupation in a single industry sector or for an occupation that exists in multiple industry sectors. In either case, applicants should identify a specific occupation to be targeted and design a training program that prepares individuals for this specific occupation.

*We recognize that there are occupations with identical required skills and credentials for entry. Applicants may propose to train individuals for multiple target occupations* ***if the required occupational skills and credentials are the same****.*

Applicants must identify a target region and include information about unmet demand for workers for the proposed target occupation. This information must come from regional employers and must include current and projected vacancies and any projected increase in demand for the proposed targeted occupation and skills, as well as credentials required for entry, to demonstrate that the occupation is of critical importance to employers in the region and that there is a need for a training and placement program.

Partnerships must identify one of the following as the target occupation:

* + an occupation within the IT cluster and/or identified in the regional blueprint for the lead applicant’s region, or
  + an occupation in another sector identified as “prioritized” or “critical but not prioritized” in the regional blueprint for the lead applicant’s region

We have outlined the above criteria for target occupations in order to facilitate statewide alignment with the [**Regional Workforce Skills Planning Initiative regional blueprint process**](https://www.mass.gov/service-details/view-your-regions-blueprint) and the collaborative efforts of Governor Baker’s Workforce Skills Cabinet.[[4]](#footnote-4)[[5]](#footnote-5) *Due to existing funding for manufacturing workforce development programs through the Advanced Manufacturing Training Program and upcoming funding for healthcare grants, we will not be accepting proposals targeted towards occupations in the manufacturing or healthcare sectors. Commonwealth Corporation plans to release another RFP in March 2020 to support partnerships who intend to run workforce programs focused on healthcare occupations. Up to $2.5 million will be available for this healthcare-focused RFP.*

For reference material to support your planning and engagement with your local workforce board, please see [***Appendix A: Target Occupation Regional Priority Chart***](#_Appendix_D:_Target)***.***

There is a growing body of research[[6]](#footnote-6) demonstrating that job seekers benefit from starting at a higher wage and by participating in programs that provide information and coaching on career continuums beyond the first entry-level job. Accordingly, we have established an across-the-board minimum wage floor of **$14.25 per hour** for the target occupation at the time of application; additionally, applicants will be required to provide evidence that the programs will place participants in jobs in which the combination of wages, employer-supported benefits and upward mobility pathways are likely to support the goal of increased earned income and economic stability. Such evidence might include:

* the proposed target occupation has ample availability for full-time work
* the proposed target occupation has attainable opportunities for career advancement and wage progression within a reasonable time frame
* the employer partners invest in supporting entry-level employees’ career advancement

1. ***Option A Target Population:***Grant funds must be used to train Massachusetts residents who are un/underemployed. For the purposes of this grant program option, unemployed and underemployed participants are included in the same target population category since the intended outcome for both types of participants is a job in the targeted occupation(s).

An unemployed individual is defined as an individual who is not currently employed.

An underemployed individual is defined as an individual who is working outside the target sector and earning less than a self-sustaining wage. As a guideline, the United States Department of Labor defines the 2019 Lower Living Standard Income Levels for the Boston-Brockton-Nashua Metro Statistical Area as $17,547 for a family of one; $28,757 for a family of two; $39,485 for a family of three; and $48,733 for a family of four. Grantees will not be required to use this standard as a means of determining whether the individual is earning less than a self-sustaining wage. However, during start-up, grantees will be required to provide a written selection process that includes the steps they will take, and criteria individuals will have to meet in order to be selected to participate in the program.

1. ***Option A Program Design Requirements:*** Applicants should propose a set of services that are necessary for the target population to enter employment and succeed in the target occupation(s). Applicants should describe each service that will be provided and explain how it prepares the target population for employment. Applicants are required to include the following elements and services in their program design:

* Develop and implement a recruitment, assessment and selection process that ensures:
  + Individuals selected to participate in the program are willing and able to work and view the program as a resource to prepare them for work in the target occupation(s)
  + Individuals are aware of the target occupation(s)’ job description(s), duties, physical requirements, schedule and work environment(s) prior to applying to the program
  + Individuals have the pre-requisite skills, OR can be enrolled in and complete a program to attain these skills, prior to enrolling in the program
* Provide contextualized education, skills, and work-readiness training that addresses the employers’ workforce needs, prepare participants for success in the targeted occupation(s), optimizes opportunities for participant learning and career development, and will support participants’ placement in the target occupation(s). This may include:
* Basic education, including ABE, GED/HiSET, ESOL, math, computers/technology contextualized to the industry and occupation(s)
* Vocational training
* Post-secondary education and credentialing
* Apprenticeship
* On-the-job training
* Paid or unpaid work experience
* Engage employers in identifying job openings, participating in program design and/or delivery, and signing the Memorandum of Agreement committing to hiring a specific number of participants or, at a minimum commit to interviewing program completers
* Assign a job developer who is responsible for active outreach to and engagement with employers to identify and secure unsubsidized job placements in the target occupation(s) for program participants, including, if relevant to the industry, unsubsidized jobs through employment agencies
* Provide support services to participants including transportation, childcare, and other flexible funding to help alleviate barriers to program completion and employment retention
* Provide coordinated case management/transitional coaching and/or mentoring and maintain documentation for each participant to plot their trajectory along a career pathway based on an individualized and comprehensive assessment of education and work history, strengths, and barriers to employment

1. ***Option A Credential Attainment:*** If a credential is required for entry into the target occupation(s), applicants should specify this in their proposal and explain how they will ensure all program completers obtain requisite credentials prior to being placed into employment.
2. ***Option A Un/Underemployed Outcome Expectations:*** A strong proposal will have the components required to achieve the following rates for completion and job placement (measured at 30 days retention):

* At least 85% of enrolled un/underemployed participants will complete training.
* At least 75% of un/underemployed participants who enroll in training will be placed in an unsubsidized job measured at 30 days retention.

Applicants may propose performance rates that are higher or lower than those detailed above. Any applicant that proposes a lower set of performance rates must explain why the proposed lower rates are appropriate for the proposed target population and proposed program design. This explanation should cite specific performance rates documented for a similar program design serving a similar population that serves as the basis for the proposed performance rates.

#### Option B: Training and Advancement Program Design Requirements

1. ***Option B Target Sector / Occupation:*** for partnerships proposing to deliver cohort-based, occupationally focused training and advancement programs to underemployed workers currently working in the target sector. This option seeks to provide opportunities for **entry-level** workers to advance to a ***new job within their current employer*** that is **full-time** and provides **wage growth** and **career growth**.

Applicants must identify a target region and include information about unmet demand for workers for the proposed target occupation. This information must come from regional employers and must include current and projected vacancies and any projected increase in demand for the proposed targeted occupation and skills, as well as credentials required for advancement, to demonstrate that the occupation is of critical importance to employers in the region and that there is a need for a training and advancement program. Employers must articulate attainable opportunities for career advancement and wage progression within the time frame of the program.

We have outlined criteria for target occupations in order to facilitate statewide alignment with the [**Regional Workforce Skills Planning Initiative regional blueprint process**](https://www.mass.gov/service-details/view-your-regions-blueprint) and the collaborative efforts of Governor Baker’s Workforce Skills Cabinet.[[7]](#footnote-7),[[8]](#footnote-8) *Due to existing funding for manufacturing workforce development programs through the Advanced Manufacturing Training Program and upcoming funding for healthcare grants, we will not be accepting proposals targeted towards occupations in the manufacturing or healthcare sectors. Commonwealth Corporation plans to release another RFP in March 2020 to support partnerships who intend to run workforce programs focused on healthcare occupations. Up to $2.5 million will be available for this healthcare-focused RFP.* For reference material to support your planning and engagement with your local workforce board, please see [***Appendix A: Target Occupation Regional Priority Chart.***](#_Appendix_D:_Target)

Partnerships must identify one of the following as the target occupation:

* + an occupation within the IT cluster and/or identified in the regional blueprint for the lead applicant’s region, or
  + an occupation in another sector identified as “prioritized” or “critical but not prioritized” in the regional blueprint for the lead applicant’s region

1. ***Option B: Target Population:***Grant funds must be used to train Massachusetts residents who are underemployed and working at entry-level wages (e.g. an individual making less than ~$15 per hour in their current job at their current employer). For the purposes of this grant program option, such individuals are considered entry-level “Incumbent workers.” An incumbent worker is defined as an individual who is working at their current employer and intends to advance to a new job with the same employer. During start-up, grantees will be required to provide a written selection process that includes the steps they will take, and the criteria individuals will have to meet in order to be selected to participate in the program.

1. ***Option B: Incumbent Worker Program Design Requirements:*** Applicants should propose a set of services that are necessary for the target population to advance within their current employer and succeed in the target occupation(s). Applicants should describe each service that will be provided and explain how it prepares the target population for advancement opportunities. Applicants are required to include the following elements and services in their program design:

* Develop and implement a recruitment, assessment and selection process that ensures:
  + Individuals are aware of the target occupation(s)’ job description(s), duties, physical requirements, schedule and work environment(s) prior to applying to the program
  + Individuals have the pre-requisite skills, or can be referred to and complete a program to attain these skills, prior to entering the program
  + Supervisors are supportive of participation, which may include providing paid release time or flexible scheduling
* Assign a career coach who is responsible for supporting participants throughout the program. This includes:
  + Development and tracking of individual participant career plans
  + Providing participants with support in balancing work/life/school
  + Serving as a liaison to supervisors or managers
  + Assisting participants to apply for advanced positions and preparing participants for interviews
  + Supporting participants, with the assistance of a job developer, in finding a new job in the event the participants lose their jobs during the duration of the grant
* Provide support services to participants, including transportation and childcare, to alleviate barriers to participation and retention
* Provide training that addresses the employers’ workforce needs, prepare participants for success in the targeted occupation(s), optimize opportunities for participant learning and career development, and help to achieve wage increases for participants. This may include:
* Basic education, including ABE, GED/HiSET, ESOL, math, computers/technology contextualized to the industry and occupation(s)
* Vocational training
* Post-secondary education and credentialing
* Apprenticeship
* Formal on-the-job training
* Work with business partners to identify the sequence of training that will result in a wage gain and the internal process to award wage gains.
* Document wage gains, promotions, and new employment retention at 30 days (at a minimum) after completion of training.
* Engage employers in identifying job openings, participating in program design and/or delivery, and signing the Memorandum of Agreement committing to grow talent in-house.
* We encourage applications seeking to leverage alternative delivery methods such as online/digital, hybrid, and competency-based modules in order to meet the unique needs of incumbent workers. To facilitate advancement opportunities, we encourage applicants to showcase creative ways of delivering training beyond in-person lecture-based modes that may not be conducive to the learning preferences of their target population.

1. ***Option B Credential Attainment:*** If a credential is required for advancement / wage progression applicants should specify this in their proposal and explain how they will ensure all program completers obtain requisite credentials prior to attaining a new position at their employers.
2. ***Option B Advancement Outcome Expectations:*** A strong proposal will have the components required to achieve the following rates for completion and job advancement (measured at 30 days retention):

* At least 90% of enrolled incumbent worker participants will complete training.
* At least 85% of incumbent worker participants who complete training will receive a training related wage gain and retain new employment at their employer for at least 30 days.

Applicants may propose performance rates that are higher or lower than those detailed above. Any applicant that proposes a lower set of performance rates must explain why the proposed lower rates are appropriate for the proposed target population and proposed program design. This explanation should cite specific performance rates documented for a similar program design serving a similar population that serves as the basis for the proposed performance rates.

Section Four: Administrative Requirements

1. ***Participant Level Data Reporting Requirements*:** Grantees will be required to collect and provide the following types of data:

Prior to enrollment: Commonwealth Corporation will work with grantees to design a strategy to collect these data as applicable. Data may include, in aggregate, applicant basic demographic information, results of applicant screening process, and for non-enrollees, the reason(s) they were not enrolled in the program.

Upon enrollment: participant demographics, participant social security numbers and participant employment status, including current hourly wage for incumbent workers.

Throughout the program: services provided and participant progression through the program, including participant attendance, participation levels, and credentials attained.

Upon program completion: new position/employment or wage advancement information and retention information.

Grantees will be required to collect enrollment data using a participant registration form provided by Commonwealth Corporation and enter data on participants and training services in a participant-level database to be provided by Commonwealth Corporation such as Apricot by Social Solutions.

Commonwealth Corporation will not provide any party with the names of any participants or any other information that may be used to identify a participant unless the participant has provided prior permission.

1. ***Program Progress Reporting Requirements:*** Grantees will be required to submit the following narrative reports using templates supplied by Commonwealth Corporation:

Quarterly Reports: These reports will be due quarterly and will include updates on the training timeline, an update and reflection on progress in meeting performance measures and reporting the project’s successes and challenges. The format for this report will be provided to grantees after a contract is awarded.

Final Report: This report will be submitted at the end of the contract period and will document what was achieved through the investment of these funds, inform future funding practices and provide information that could be used more generally among organizations doing similar work. The format for this report will be provided to grantees after a contract is awarded.

Commonwealth Corporation is required to submit an annual report to the legislature providing results of the grants made through the Workforce Competitiveness Trust Fund. Commonwealth Corporation will provide the legislature with grantee specific information and will use data from the database and information from the narrative reports as a primary source.

1. ***Participant Eligibility & Documentation:*** Grantees must establish a selection and eligibility process to identify individuals appropriate to participate in training. In addition to the program specific eligibility criteria established by Commonwealth Corporation, the grantee and its industry partners will be required to collect and maintain the following documentation for each participant:
   * Documentation of the participant’s employment status at the time of enrollment
   * Participant Registration Form, using a required form provided by Commonwealth Corporation
   * Documentation of training services received
   * Case management/coaching notes
   * Documentation of new employment, wage increases and retention
2. ***Program & Fiscal Monitoring:*** Commonwealth Corporation is responsible for ensuring that organizations receiving grant funds:
3. have the fiscal and program systems needed to meet all relevant federal and state requirements;
4. meet the terms of the grant award outlined in the contract with Commonwealth Corporation;
5. provide quality services to program participants; and
6. expend grant funds only for allowable activities.

To fulfill this responsibility, Commonwealth Corporation will periodically request and review documentation related to the grantee organization and grant expenses and activities. We anticipate conducting at least one in-person fiscal review over the duration of the grant period. Additional information will be provided after a contract is awarded.

1. ***Technical Assistance:*** Each grantee will be assigned a Commonwealth Corporation Program Manager and must assign a main point of contact at their organization who is accountable for the grant. The Commonwealth Corporation Program Manager will be available to support grantees through the duration of the grant, answering questions about operational issues as well as providing technical assistance to ensure grantees meet their performance outcomes.
2. ***Payment:*** Funds will be disbursed on a cost reimbursement basis. Grantees will be required to submit invoices on a monthly basis using an invoice template supplied by Commonwealth Corporation. Grantees will only be reimbursed for expenses incurred during the period of the contract. Grantees are required to maintain and submit, upon request, back-up documentation for expenses and match contributions.
3. ***Project Terms and Conditions*:**  Grantees will be required to abide by Commonwealth Corporation’s Standard Contract Terms and Conditions, which will be provided during contract negotiation. Applicants may review these terms and conditions prior to submitting an application by contacting Anthony Britt at [abritt@commcorp.org](mailto:abritt@commcorp.org) to request a copy. In addition, all final contracts are subject to negotiation of a final statement of work.
4. ***Deliverables and Ownership:*** Grantees agree to license or otherwise make available to Commonwealth Corporation in perpetuity, without charge, all materials prepared and/or produced in whole or in part with these funds, for Commonwealth Corporation’s use and dissemination.
5. ***Equipment:*** It is anticipated that partnerships will utilize existing capacity to deliver training programs, including existing equipment that can be used to provide hands-on training to participants. If equipment required to continue or increase seat capacity is not available in a region, applicants may make a case to use grant funds for this purpose. A good case would include a summary of an inventory of current capacity and an analysis of the gap between current capacity and the capacity needed to meet projected enrollments.

Section Five: Available Funding & Allowable Costs

1. ***Funding Availability & Grant Award Amount:*** $2 million is available for this grant program.

Contracts will be issued for up to two years unless the duration of the training required for entry into the target occupation requires additional time and, in that case, the applicant may request up to a three-year grant duration. For example, an applicant proposing a two-year associate’s degree program may request up to three years. However, a program proposing to deliver an eight-week training program may provide multiple cohorts over a maximum period of two years

1. ***Matching Funds:*** Awardees will be required to provide a 30% match of total awarded funds. Match may include:

* Staff time to support the program
* Support services
* Rent and associated operating costs not charged to the grant
* Other expenses related to program implementation

1. ***Allowable Costs:***  Funds may be used for costs associated with delivering education and training activities, and/or other services to prepare participants for success in the targeted occupation(s), optimize opportunities for participant learning and career development, and help to achieve placement for participants. Funds may be used to support the following:

* Outreach, recruitment, assessment and selection
* Support services needed to ensure participants’ success, such as transportation, child care, uniforms and tools
* Flexible funding: monies meant to address individual barriers to program or job retention that may not be uniform nor predictable in nature, such as car repairs or verifiable emergencies
* Training delivery, including classroom, online and formal on-the-job training
* Stipends for participating in training and work experience
* Staff time for partnership and program coordination, job development, case management and data entry
* Costs of licenses associated with delivery of digitally-enabled training
* Limited funds for marketing and research and evaluation

1. ***Cost per Outcome:*** Each training program proposal will be evaluated based on the cost per employment outcome, which includes the number of un/underemployed participants who get an unsubsidized job or wage gain measured at 30 days retention. As a benchmark, we have established a planned maximum investment target of **$10,000** **per employment outcome** (placement or advancement), on average. Applicants should be thoughtful about what they propose in order to maximize public dollars. *Historically, WCTF grantees have averaged a cost per employment outcome of approximately $7,000 - $8,000.* This amount includes all expenses required to obtain an employment outcome, including recruitment, training, support, program design and program management. This amount does not include leveraged resources and funds contributed as match. Please see sections 3A-E and 3B-E for additional outcomes guidelines. If an applicant proposes to serve a population that requires more intensive and/or longer duration of services to be successful, applicants may propose a cost per outcome that exceeds this amount; however, you must justify this cost per outcome in the budget notes section.

Section Six: Submission Schedule & Instructions for Submission

1. ***Submission Schedule:***

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Request for Proposals Released | February 27, 2020 |
| Deadline to Submit Written Questions | April 2, 2020 |
| All Answers to Questions Posted Online | April 6, 2020 |
| Responses (Proposals) Due | April 9, 2020 by 5:00 PM |
| Applicants Notified of Status (Anticipated) | Late June 2020 |
| Anticipated Contract Start Date | July 1, 2020 (tentative) |
| Anticipated Contract End Date | June 30, 2022/23 (tentative) |

1. ***Clarification Period*:** Questions about this grant program will be accepted in writing from February 25, 2020 through April 2, 2020 at 5:00 PM. Please submit all questions via email to Anthony Britt at [abritt@commcorp.org](mailto:abritt@commcorp.org). All questions will be responded to and posted on Commonwealth Corporation’s website at [www.commcorp.org](http://www.commcorp.org) by the specified date. Applicants can sign up at the following link to receive email notifications when new responses are posted: <https://commcorp.tfaforms.net/328813>. However, all potential applicants and interested parties are advised to check the Commonwealth Corporation’s website periodically for additional information and updates until proposal submissions are due.
2. ***Application*** ***Submission Instructions*:** Grant Applications are due in an electronic format no later than 5:00 PM on Thursday, April 9, 2020. Please upload your submission electronically to the following link: <https://commcorp.tfaforms.net/328802>. In order to upload your submission, you will need to complete an online form that provides the following information: (1) the **Name** of the lead applicant organization, (2) the lead applicant organization’s **Federal Employer ID Number**, (3) the lead applicant organization’s **Department of Unemployment Assistance ID Number**, (4) the **Total Program Design Funds Requested**, and (5) the lead applicant organization’s **Primary Contact Information** (to be notified upon decision of grant award).

Applicants should review all components prior to uploading in order to ensure they have completed all the required information. Should you encounter any submission issues, please contact Anthony Britt at [abritt@commcorp.org](mailto:abritt@commcorp.org) or 617-717-6909.

* Narrative forms must be submitted in MS Word file format.
* Budgets must be submitted in MS Excel file format.
* Signed MOAs or letters of commitment must be scanned and submitted in the form of a single PDF file.
* COGS must be submitted in the form of a single PDF file.

1. ***Training Program Grant Application Package:*** The following parts make up the required components of the Grant Application Package. Failure to provide any of the documents or materials listed below may result in the disqualification of the application. Do not change the order of the questions/sections. You may adjust the spacing in each section to accommodate your answers. Do not use a font size smaller than size 11 nor margins less than one inch.

**Part 1: Application Summary Form**

This form provides Commonwealth Corporation with summary level information about the proposed program. You may adjust the spacing as needed to accommodate your answers. This form should be the title page of your Grant Application Package.

**Part 2: Pipeline Training Program Application Narrative Form**

This form provides a list of questions that you must address in your application. Answer all the questions included on the Narrative Form. The page limit for the Narrative Form is 12 pages.

**Part 3: Training Program Design Description Form**

Complete this form for your proposed training program. In the description field, please also provide information about the instructional methodology(ies). Add rows as necessary.

**Part 4: Training Timeline Form**

Complete the Training Timeline Form to include all proposed training activities.

**Part 5: Budget & Budget Narrative Forms**

Part 5a, 5b & 5c are the Budget, Budget Narrative and Match Contribution Forms. These are included as a separate MS Excel Workbook labeled “WCTF Application Budget and Outcome Forms.” You must submit a detailed budget request using the provided forms. The budget will also become the financial basis for any grant award, and for making cost reimbursement payments over the course of the project. Commonwealth Corporation reserves the right to modify application budgets prior to and/or after grant award.

**Part 6: Outcome Chart Form**

Part 6 is the Outcome Chart Form. This is included as a separate MS Excel Workbook labeled “WCTF Application Budget and Outcome Forms.” Complete the Outcomes Form with goals for enrollment, completion, and job placement/advancement measured at 30 days retention. These outcomes will be contract deliverables.

**Part 7: Memorandum of Agreement (MOA) / Letters of Commitment**

Part 7 is the sample Memorandum of Agreement (MOA). Each partner’s commitments, roles and anticipated activities must be provided either through a jointly signed Memorandum of Agreement (MOA) among partners or through the submission of separate letters of commitment. Applicants should edit and make additions to the sample MOA as appropriate in order to indicate specific partner roles and responsibilities. This component pertains to all partnership members in addition to the required employer and MassHire partners.

**Part 8: Certificate of Good Standing from the Massachusetts Department of Revenue**

All **lead applicants**\* must submit a Certificate of Good Standing (COGS) from the Massachusetts Department of Revenue. *\*Please note that community colleges, public vocational technical high schools, and public state universities serving as the lead applicant do not need to submit a Certificate of Good Standing.*

**Part 9: Certification**

Must be attested to online by an individual who has signatory authority for the lead applicant upon submission.

Section Seven: Proposal Evaluation Process and Criteria

1. ***Proposal Evaluation Process***: Proposals submitted in response to this solicitation will be reviewed by Commonwealth Corporation. Representatives of the Executive Office of Labor and Workforce Development and other state agency partners may participate in this process.

The review process will consist of the following steps:

**Step 1: Threshold Criteria Screening**

Submissions will be screened for completeness, conformity to the program requirements and timeliness of response. Submissions that are incomplete, non-conforming, or late may not be considered.

**Step 2:** **Compliance Screening**

Commonwealth Corporation will conduct an analysis to ensure all lead applicants are in compliance with state and federal law. Lead applicants are encouraged to review these criteria and ensure they are in compliance prior to submitting an application. Commonwealth Corporation will conduct the following reviews to ensure compliance:

* Ensure applicants are in good standing with the Massachusetts Department of Revenue. Commonwealth Corporation will conduct this screening by reviewing the Certificate of Good Standing (C.O.G.S.) submitted in the Qualifications Submission Package. **Please note that community colleges, public vocational technical high schools and public state universities serving as the lead applicant do not need to submit a Certificate of Good Standing.**
* Please follow this guidance when requesting and submitting a Certificate of Good Standing from the Department of Revenue:
  + The **Certificate of Good Standing from the Department of Revenue** is **NOT** the same and should not be confused with a **Certificate of Incorporation from the Secretary of State**
  + C.O.G.S. must be less than six months old
  + Please visit the Department of Revenue’s website:

(<http://www.mass.gov/dor/businesses/programs-and-services/certificate-of-good-standing.html>) for more information about the C.O.G.S. and to complete an online application to obtain a Certificate

* + Applications for a C.O.G.S. can take 4-6 weeks to be processed
* Ensure applicant is in full compliance with all obligations to the Department of Unemployment Assistance, Department of Industrial Accidents, and any other obligations to the Commonwealth of Massachusetts. Commonwealth Corporation will work with the Department of Unemployment Assistance to conduct this review.

**Step 3: Review Committee**

A review committee will review and score all eligible submissions. Review results will be documented. Commonwealth Corporation reserves the right to request additional information from any applicant to ensure that the review committee has a complete understanding of the proposed program and applicant qualifications.

Submitted proposals will be reviewed and scored based on the following criteria:

|  |  |
| --- | --- |
| **Category** | **Point Value** |
| A. Track record of success and qualifications/capacity of lead applicant and partner organizations with grant management, fiscal coordination, and implementation of proposed program design | 12 |
| B. Clearly identified and articulated target occupation, target population, and need for project | 12 |
| C. Strong evidence of employer engagement in partnership and program design, including job placement strategy that is likely to result in placement/advancement and retention for a majority of program completers | 20 |
| D. Clear program design that addresses the required program design elements and services for specified program option, including relevance to proposed target population and occupations targeted for job placement or advancement for incumbent workers | 24 |
| E. Strong MOA/letters that include an articulation of shared goals and roles, responsibilities, and commitments of each partner, including strong commitments from employers that indicate a strong likelihood that employers will hire program completers | 12 |
| F. Budget accuracy and reasonableness | 8 |
| G. Outcomes meet the rate guidance in Sections 3A-E, 3B-E, and 5D or applicant provides sufficient evidence demonstrating the case for meeting a lower benchmark; Outcomes seem attainable, given the proposed population and program design | 12 |

***Please note:*** Commonwealth Corporation reserves the right to consider the applicant’s past performance in operating grants administered by Commonwealth Corporation and factor this performance into funding decisions.

**Step 4: Notification of Grant Award Status**

All applicants will be notified of their award status by email.

1. ***Additional Evaluation Notes:*** In addition to the scoring system outlined,Commonwealth Corporation reserves the right to only consider submissions that, in our sole judgment, are complete and responsive to the solicitation’s requirements and include all required application components. Additionally, Commonwealth Corporation and the Executive Office of Labor and Workforce Development reserve the right to consider other criteria in making competitive awards among comparably qualified applicants. Commonwealth Corporation reserves the right to reject any and all applications, or to accept any and all applications, in whole or in part, if deemed to be in the interest of the Commonwealth Corporation or the Commonwealth of Massachusetts to do so. This RFP does not commit Commonwealth Corporation to award any contracts. Upon submission, all applications become the property of Commonwealth Corporation. Commonwealth Corporation is not responsible for electronic submissions that are not received by Commonwealth Corporation. We reserve the right to use sources of funding other than the WCTF FY’20 Appropriation to support proposals submitted in response to this solicitation. If applicants propose to use other funding sources to support the implementation of the proposed program, Commonwealth Corporation reserves the right to consult with the other funders to ensure appropriate alignment of resources.
2. ***Appeals:*** Appeals of the funding decision may be filed with Theresa Rowland, Interim President/CEO, Commonwealth Corporation, 2 Oliver Street, 5th Floor, Boston, MA 02109. Appeals must be filed within fifteen (15) days of the date of Commonwealth Corporation’s notice to unsuccessful bidders. The President may decide to hold an informal review of the decision, and may decide to grant an appeal, deny an appeal, or modify an award based on information provided during the informal review.
3. ***Audited Financial Statements and Verification of Fiscal Management Capacity****:* All applicants that are selected for an award will be required to submit a copy of the organization’s most recent audited financial statement prior to the execution of a final contract.In addition, prior to the grant award, Commonwealth Corporation staff may review an organization’s fiscal systems and internal controls to verify that the organization has the capacity to manage public grant funds and administer the program.
4. ***Project Terms and Conditions*:** Grantees will be required to abide by Commonwealth Corporation’s Standard Contract Terms and Conditions, which will be provided during contract negotiation. Applicants may review these terms and conditions prior to submitting an application by contacting Anthony Britt at [abritt@commcorp.org](mailto:abritt@commcorp.org) to request a copy. In addition, all final contracts are subject to negotiation of a final statement of work.

Section Eight: Summary of Attachments

**APPENDICES:**

The following documents are included for your reference:

* Appendix A: Target Occupation Regional Priority Chart

**GRANT APPLICATION PACKAGE:**

The following attachments must be completed and submitted by all lead applicants:

* Part 1: Application Summary Form
* Part 2: Training Program Application Narrative Form
* Part 3: Training Program Design Description Form
* Part 4: Training Timeline Form
* Part 5a, 5b & 5c: Program Budget, Budget Narrative and Match Narrative Forms
* Part 6: Outcome Chart Form
* Part 7: Sample Memorandum of Agreement (MOA)
* Part 8: Certificate of Good Standing
* Part 9: Certification

# Appendix A: Target Occupation Regional Priority Chart

|  |  |  |  |
| --- | --- | --- | --- |
| **Region** | **Workforce Boards** | **Priority Industries\*** | **Priority Occupations\*** |
| **Northeast** | Greater Lowell, Merrimack Valley, North Shore | I.T. | Computer Related and IT Support, Engineering, Engineering Technician |
| **Greater Boston** | Boston, Metro North, Metro South/West | I.T. | Computer and Information Analysts, Software Developers and Programmers, Database Administrators, I.T. Support Specialists |
| **Southeast** | Bristol, Brockton Area, Greater New Bedford, South Shore | I.T., Finance | Office and Administrative Support |
| **Cape & Islands** | Cape Cod and Islands | Hospitality, Construction | Chefs and Head Cooks, Educators, Teachers' Assistants, Construction Occupations |
| **Central** | Central Region, North Central | Transportation / Warehousing | Transportation and Material Moving, Construction and Extraction Occupations |
| **Pioneer Valley** | Franklin/ Hampshire, Hampden | Education | Social & Human Service Assistants, Educators, Teachers' Assistants |
| **Berkshire** | Berkshire | Hospitality | Chefs and Management, Cross-Over Occupations (e.g. Office/Administrative Support) |

\* Due to existing funding of manufacturing workforce development programs through the Advanced Manufacturing Training Program as well as upcoming funding for healthcare programs, we will not be accepting proposals targeted towards these industries; therefore, we have removed these industries from the illustrative chart above.

\*While applicants may propose to target an IT occupation regardless of geography, we strongly encourage a review of the [Regional Blueprint](https://www.mass.gov/service-details/view-your-regions-blueprint) for the lead applicant organization’s area in order to facilitate alignment and more robust partnerships.

Part 1: Application Summary Form

Please complete each question on the Program Profile and Contact Information forms. You may adjust the spacing in this section to accommodate your answers. Do not delete any of the questions. There is no page limit for Attachment 1, but we ask that you limit responses only to what is necessary to answer each question sufficiently.

*Please note: This symbol* **^** *identifies information which you will also need to enter on the online submission form (see Section 6C Submission Instructions).*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **1. PROGRAM PROFILE** | | | | | | | |
| **Name of Lead Applicant Organization ^:** | |  | | | | | |
| **Department of Unemployment Assistance ID Number ^:** | |  | | **Federal Employer ID Number (FEIN) ^ :** | | |  |
| **Applicant Type^:** *Please select (⌧) the type of organization that represents the lead organization.* | | | | | | | |
| Community-Based Organization, including Adult Basic Education Providers  Employer  Employer Association  Higher Education Institution  Labor Organization | | | Local Workforce Development Entity  Local Workforce Board  Nonprofit Education, Training, or Other Service Provider  One-Stop Career Center  Vocational Education Institution | | | | |
| **Program Name &/or Partnership^:** | |  | | | | | |
| **Which Program Category Are You Applying To?^:** *(Pick One)* | | Program Option A: Training and PLACEMENT Program (Un/Underemployed)  Program Option B: Training and ADVANCEMENT Program (Incumbent) | | | | | |
| **Target Industry / Occupation(s)^:** | | IT: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | |
| **Proposed Duration of this WCTF-Funded Program^:** | | (2 yr.) Two-Year Grant  (3 yr.) Three-Year Grant | | **Proposed Grant Start Date:** | | |  |
| **Proposed Grant End Date:** | | |  |
| **Total Implementation Funds Requested ^:** *(up to maximum $250,000 (2 yr.) / $350,000 (3 yr.)* | | **$** | | **Proposed # Enrollments:** | | |  |
| **Proposed # Placements OR Advancements^:** | | |  |
| **2. PROGRAM SUMMARY**  *In the space provided below, please provide a brief description of your proposed training program in* ***400 words or fewer****. Please keep in mind that if your organization is awarded funding, this is the program summary that will be used in public announcements. Please see here for* [*sample project summaries*](http://commcorp.org/wp-content/uploads/2016/07/wctf-resource_2016-grantee-list.docx)*.* | | | | | | | |
|  | | | | | | | |
| **3. LEAD APPLICANT CONTACT INFORMATION** | | | | | | | |
| **Role** | **Name and Title** | | **Address** | | **Phone** | **Email** | |
| **Primary Contact Person^:** (notified upon decision of grant award) |  | |  | |  |  | |
| **Authorized Signatory^:** (authorized to commit organization) |  | |  | |  |  | |
| **Fiscal Contact^:**  (fiscally responsible for project funds and submitting invoices) |  | |  | |  |  | |
| **Project Manager^:**  *(if known -* contact over the course of the project) |  | |  | |  |  | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **4. PARTNERSHIP MEMBERS AND CONTACT INFORMATION**  *Please list the organizations and contact information for all required\* and additional partners. All partners listed below must be included on an MOA unless otherwise noted. You may add rows as needed to represent your partnership. \*At least two employers with operations in Massachusetts that employ Massachusetts residents in the targeted occupation are required in addition to the local MassHire Workforce Board and Career Center.* | | | | |
| **Organization Type** | **Organization Name** | **Address** | **Contact Name / Title** | **Phone / Email** |
| **Employer Partner 1\*** |  |  |  |  |
| **Employer Partner 2\*** |  |  |  |  |
| **MassHire Workforce Board\*** |  |  |  |  |
| **MassHire Career Center\*** |  |  |  |  |
| **Example: Training Provider** |  |  |  |  |
| **Example: Community -Based Org.** |  |  |  |  |
| **Example: Housing Agency** |  |  |  |  |
| **Example: Local Office of Public Agency** |  |  |  |  |

Part 2: Training and Placement / Advancement Program Narrative Form

Please describe your project by responding to the questions below. Please do not use a font size smaller than size 11 and margins less than one inch. The page limit for the Narrative Form is 12 pages. Tables, charts, figures, and appendices are included in the page limit. The page limit does not include the other required Parts of the Grant Application Package.

1. ***Need for Project and Target Occupation:*** Within this section, please describe the need for your proposed program within your region by describing the specific occupation that you plan to target in accordance with the criteria outlined in Section 2 and the regional demand for this target occupation by addressing the following points:
2. What is the geographic area you are proposing to serve?
3. Which occupation will your program prepare participants for?
4. What labor market problem are you seeking to solve?
5. How did your partnership determine that there are and will be a sufficient number of vacancies in these occupations to meet your proposed placement goals?
6. Using the table below, provide evidence that there will be sufficient job vacancies in the targeted occupation(s) among partner employer(s) when participants are prepared for placement (over the duration of the implementation period: approximately 7/1/2020 – 6/30/2022 or 6/30/2023):

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Regional Employer Demand Chart**  \**You must include at least your two employer partners below.*  *You may add rows to the table for additional employers as needed.* | | | | | | |
| **Employer** | **Target Occupation Title** | **Number of Current Vacancies in Occupation** | **Number of Anticipated Job Openings Over Duration of Implementation Period** | **Skills Required for Entry** | **Credentials Required for Entry** | **Average Hourly Wage**  **At Entry** |
| **Name of Employer Partner 1\*:** |  |  |  |  |  |  |
| **Name of Employer Partner 2\*:** |  |  |  |  |  |  |
| **Name of Employer Partner 3:** |  |  |  |  |  |  |

1. ***Target Population*:** Within this section, please describe the specific population that you plan to serve in accordance with the criteria outlined in Section 3 by responding to the following points:
2. Describe the specific target population you plan to serve (this can be a more specific sub-set of the WTCF target population criteria outlined in Section 3).
3. Provide an explanation of why your chosen population is an appropriate fit with the target occupation(s).
4. Do you anticipate that the target population will likely have associate’s degrees or other higher-level degrees? If yes:

* Why are these individuals with degrees appropriate for the target occupation(s)?
* Will individuals without associate’s degrees or higher-level degrees still be viable candidates for the program? If yes, how will you design a selection process that allows individuals without degrees to still have an opportunity to participate in the program, if they are otherwise a good candidate?

1. Describe the track record and experience of partnership member organizations in recruiting and working with the target population.

**Sections numbered 3 and 4** ask for more detail about the program design that will be designed and implemented to serve the specific target populations you are proposing to serve (un/underemployed (A) or incumbent workers (B)). Please answer the questions for the relevant program option.

***Please only respond to EITHER Section 3 OR Section 4.*** *You may delete the unnecessary section.*

1. ***(Option A Only) Un/Underemployed Training and Placement Program Design:*** If you are proposing to serve un/underemployed MA residents please answer the following questions:
2. ***Recruitment, Assessment & Selection***

* Who (name, title, organization) will be responsible for recruiting participants?
* What is the number of individuals you expect to need to engage in recruitment activities for each program cycle to be able to meet your enrollment goals?
* What methods (e.g. open houses, orientation, referrals, etc.) will be used to recruit participants? Why do you believe this will be an effective strategy to recruit a sufficient number of qualified program candidates from your target population? Please provide your current list of partners or organizations that will be sources for referrals.
* Describe the selection and assessment process. What criteria will be used to determine candidates’ readiness and fit with the proposed program and target occupation? What process and tools will be used to determine whether prospective participants meet these criteria?
* Describe how employers will be involved in designing and/or implementing the assessment and selection processes to ensure that they are aligned with the requirements of the targeted occupation.

1. ***Training Design and Delivery***

Please describe the training program you plan to deliver with this funding and complete Part 3 and Part 4. Be sure to describe how each component (e.g. work experience, ABE, etc.) is integrated within your overall program and will prepare participants for successful placement in the targeted occupation(s).

Will you use existing curricula for these components or develop new curricula?

What methodology will be used to assess participants’ technical and soft skill acquisition in the training and education components?

Is a credential required for entry into the targeted occupation? If so, what is the strategy for ensuring that participants earn the credential? How is the credential earned and which organization awards the credential? Is there an exam participants must pass in order to receive the credential? If so, which organization administers the exam? Is there a fee? What are the prerequisites for attempting to earn the credential (passing an accredited class, work experience, etc.)?

If the lead applicant organization is not the training provider or credentialing organization, how will you ensure that program staff (including placement and case management staff) can obtain information about participants’ attendance, progress in course work, and results of assessments and credentialing exams?

Describe how partners, including employer partners, will be involved in providing input and regular feedback about the training and education components to ensure they are aligned with (technical and non-technical) job requirements and lead to successful job placement in the targeted occupation(s).

1. ***Participant Supportive Services and Case Management/Transitional Coaching***

* Who (name, title, organization) will be responsible for providing case management/coaching?
* What applicable supports will the partnership provide to participants to help them overcome personal barriers to successful completion and employment (e.g. financial counseling, public assistance navigation, stipend payments during training, transportation, child care, tuition support, uniforms, tools, etc.)?
* How will case managers work with participants to determine their needs in the context of their families/household and develop a plan to address them throughout the duration of the program?
* How will all members of the program staff share relevant information with each other to ensure they are fully informed on a timely basis about each participant’s progress and needs for support?

1. ***Job Development and Placement/ Advancement***

* Who (name, title, organization) will be responsible for job placement?
* How will you verify demand for your proposed target occupation?
* How will you determine whether a participant has successfully completed the program and is ready for placement? Which partners will be involved in making this determination?
* Who (names and organizations) are the hiring managers responsible for making decisions about which candidates are interviewed and hired? How will they be engaged throughout the design and implementation of the program, including the job placement phase?
* Describe your planned job search, job development and job placement activities. What will be the responsibilities of participants and of staff in these services? What activities will the job developer conduct to develop unsubsidized jobs and place participants who complete training into them?
* What services will be available to participants after they have been hired?
* What supports will be available to employers after they have hired a participant?
* Based on your engagement with employers, how will your program work with participants to ensure they can take advantage of specific opportunities for advancement within this occupational track?

1. ***(Option B Only) Incumbent Worker Training and Advancement Program Design:*** If you are proposing to serve incumbent workers please answer the following questions:
2. ***Recruitment, Assessment & Selection***

* Who (name, title, organization) will be responsible for recruiting participants?
* What is the number of individuals you expect to need to engage in recruitment activities for each program cycle to be able to meet your enrollment goals?
* What methods (e.g. open houses, orientation, referrals, etc.) will be used to recruit participants from your employer partners? Why do you believe this will be an effective strategy to recruit a sufficient number of qualified program candidates?
* Describe the selection and assessment process. What criteria will be used to determine candidates’ readiness and fit with the proposed program and target occupation? What process and tools will be used to determine whether prospective participants meet these criteria?
* Describe how employers will be involved in designing and/or implementing the assessment and selection processes to ensure that they are aligned with the requirements of the targeted occupation.
* How will the current and future managers of the incumbent workers be involved in the recruitment and selection process?

1. ***Training Design and Delivery***

Please describe the training program you plan to deliver with this funding **and complete Part 3 and Part 4**. Be sure to describe how each component (e.g. work experience, ABE, etc.) is integrated within your overall program and will prepare participants for successful placement in the targeted occupation(s).

Will you use existing curricula for these components or develop new curricula?

What methodology will be used to assess participants’ technical and soft skill acquisition in the training and education components?

Is a credential required for entry into the targeted occupation? If so, what is the strategy for ensuring that participants earn the credential? How is the credential earned and which organization awards the credential? Is there an exam that participants must pass in order to receive the credential? If so, which organization administers the exam? Is there a fee? What are the prerequisites for attempting to earn the credential (passing an accredited class, work experience, etc.)?

If the lead applicant organization is not the training provider or credentialing organization, how will you ensure that program staff (including placement and case management staff) can obtain information about participants’ attendance, progress in course work, and results of assessments and credentialing exams?

Describe how partners, including employer partners, will be involved in providing input and regular feedback about the training and education components to ensure they are aligned with (technical and non-technical) job requirements and lead to successful advancement in the targeted occupation(s).

1. ***Participant Supportive Services and Coaching***

* Who (name, title, organization) will be responsible for providing career coaching support?
* How frequently will career coaches have contact with participants to assess their need for supports?
* How will career coaches engage with and interact with supervisors of incumbent workers?
* What applicable supports will the partnership provide to participants to help them overcome personal barriers to successful completion advancement (e.g. financial counseling, public assistance navigation, transportation, child care, tuition support, tools, etc.)?
* How will all members of the program staff share relevant information with each other to ensure they are fully informed on a timely basis about each participant’s progress and needs for support?

1. ***Job Advancement and Wage Gains***

* How will you determine whether a participant has successfully completed the program and is ready for advancement? Which partners will be involved in making this determination?
* Describe when training related advancement and wage gains will occur for incumbent workers (specific date or benchmark) and the process that employers will use to implement these advancements.
* What will be included and how will you organize and deliver post-program support and job retention services? What services will be available to participants after they have advanced into their new role?
* What supports will be available to employer partners after they have promoted a participant? How will hiring manger be engaged?

**Question section numbers 5 and 6 pertain to both program options**

**and must be completed by ALL applicants.**

1. ***Partnership Staffing and Engagement***

Please describe the partnership you’ve established for this project, including:

1. Is this a new or existing partnership? If existing, why was the partnership established originally?
2. Describe the role of each partner in the partnership and demonstrate that collectively, the partners, including the lead applicant, have the required experience, capacity and expertise to accomplish the goals of the program.
3. What is the management structure of the partnership? Who makes decisions? Who staffs the partnership? Describe each staff member’s roles and responsibilities and indicate their experience and qualifications.
4. Describe the level of decision-making authority the project/program manager will have and the manager’s access to key program and policy decision makers throughout the implementation period. What relationship will this position have to the partnership group? To whom is the project/program manager accountable?
5. Please clearly indicate which specialized positions will need to be hired for this grant program.
6. ***Past Performance***

We are interested in funding organizations that have a track record of success and qualifications/capacity with grant management, fiscal coordination, and implementation of workforce development programs:

1. Have you delivered this program before? If so, please provide information about the funding source and the dates the program was offered.
2. Is there funding currently available to deliver this same program over the same time period covered by this grant program (approx. July 2020-June 2022/2023)? If so, what is the source of the funding? *(We appreciate thorough responses and applicants will not be penalized for doing so)*
3. Please fill in the following chart to provide a brief snapshot of your past performance in operating this program. If you have not operated this program before, please tell us briefly about a recent grant for a similar program that the lead applicant was responsible for managing.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***Program Name***  ***\*Please indicate whether this performance data is for delivery of the same program or a similar program.*** | ***How many times have you offered this program and over what period of time (provide # of years)?*** | ***How many individuals have you enrolled to date?*** | ***How many individuals have completed to date?*** | ***How many individuals have been placed to date?*** |
|  |  |  |  |  |

1. In reviewing the data provided in the chart above, as well as other performance metrics, did you consider your program successful?
   1. If so, why?
   2. If not, why and what will you do to address it in this program?
2. Please describe a relevant strategy and/or innovation in workforce development that you have pursued or will seek to incorporate into your program to more effectively reach and serve more people from diverse backgrounds.

Part 3: Training Program Description Form

Please complete this form for your proposed training program. Add rows if there are more than 8 sub-topics. In the description field, please also provide information about the instructional methodology.

|  |  |
| --- | --- |
| **Program Name** |  |
| **Total Hours of Instruction** |  |

|  |  |
| --- | --- |
| Sub-Topic 1 |  |
| Estimated # of Hours |  |
| Description |  |

|  |  |
| --- | --- |
| Sub-Topic 2 |  |
| Estimated # of Hours |  |
| Description |  |

|  |  |
| --- | --- |
| Sub-Topic 3 |  |
| Estimated # of Hours |  |
| Description |  |

|  |  |
| --- | --- |
| Sub-Topic 4 |  |
| Estimated # of Hours |  |
| Description |  |

|  |  |
| --- | --- |
| Sub-Topic 5 |  |
| Estimated # of Hours |  |
| Description |  |

|  |  |
| --- | --- |
| Sub-Topic 6 |  |
| Estimated # of Hours |  |
| Description |  |

|  |  |
| --- | --- |
| Sub-Topic 7 |  |
| Estimated # of Hours |  |
| Description |  |

|  |  |
| --- | --- |
| Sub-Topic 8 |  |
| Estimated # of Hours |  |
| Description |  |

Part 4: Training Timeline Form

Please list each training cycle that will be offered, in chronological order. Add more rows as necessary.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Cycle # / Cohort #** | **Planned # of Participants Enrolled** | **Training**  **Start Date**  **(Month/Year)** | **Training**  **End Date**  **(Month/Year)** | **Other Notes (e.g. internship dates, graduation dates if different from training end date, etc.)** |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 (if applicable) |  |  |  |  |
| 4 (if applicable) |  |  |  |  |
|  |  |  |  |  |

*Note: we encourage non-overlapping training cycles in order to facilitate deeper learning and reflection between cohort recruitment and training start dates.*

Part 5a, 5b & 5c: Budget, Budget Narrative & Match Contribution Forms

**General Instructions:** The proposed budget must be submitted using the following attachments provided in MS Excel file format:

1. Budget Form (Part 5a)
2. Budget Request Narrative Form (Part 5b)
3. Match Contribution Narrative Form (Part 5c)

***Budget Form (Part 5a):*** serves as a cover sheet to the Budget Request Narrative and Match Contribution Forms. While it is formatted with formulas, please check all amounts for accuracy prior to submission. The Budget Form also includes a cost analysis, using information entered into the Outcome Chart Form (Part 6) and the Budget Request Narrative (Part 5b) to calculate the cost per outcome and the annualized wages associated with placement/advancement into a new job. Reviewers will use these calculations in conducting a cost benefit analysis.

***Please see Section Five for additional outcome guidance.***

***Budget Request Narrative Form (Part 5b):*** outlines all of the project costs for which you are requesting grant funds. This budget should be based upon the entire requested grant duration (up to two years).

Each line item amount should have clear and sufficient cost rationale. Applicants must complete the following columns for each line item for which they are requesting funds.

* ***Actual Cost (AC) or Cost Allocation (CA):*** Please identify whether these expenses will be charged based upon actual costs or a cost allocation plan.

**Please note:** Applicants awarded funding will be required to provide a copy of their cost allocation plan during contract negotiations. If the cost allocation plan does not include sufficient detail or is updated on a monthly or ongoing basis, this updated information must be included along with other required back-up during specified monthly invoices. Any changes to this plan must be submitted to Commonwealth Corporation for the duration of the grant.

* ***Description of use of funds:*** Please include a description to explain how funds will be used.
* ***Calculations:*** To reduce calculation errors, please use these two columns to include the rate and unit of measurement used to calculate each line item. Instructions for specific line items are included below in the Category Instructions. Applicants may include additional detail in the ***description of use of funds*** column to explain any expenses that do not conform to the standard unit of measurement @ rate calculation format.

***Match Contribution Form (Part 5c):*** following the same format and process as the Budget Request Narrative Form, the Match Contribution Form outlines all the project costs that will be funded from other sources. Each match line item amount should have clear and sufficient cost rationale. Awardees will be required to provide a *30% match of total awarded funds*. Match contributions may be cash or in-kind.

Please follow the Category Instructions below for completing the Budget Request Narrative and Match Contribution Forms and remember to *check all amounts* and formulas for accuracy prior to submission.

**Category Instructions**: Budget Request Narrative Form

**A. Salary & Fringe**

Salary: This category is for project costs related to staff that will be performing project-related functions and will be on the payroll of the lead applicant only.

The budget should include:

* each staff person (name, if known and job title) on a separate line
* actual rates of pay each staff person will receive for compensation in the column labeled “Rate/hour”
* the quantity of hours each staff person will work on this grant in the column labeled “hours”

Grantees may not invoice Commonwealth Corporation for staff roles that are not included on the budget in the contract. Grantees may charge a higher hourly rate than the rates listed in the budget in the contract. However, grantees are responsible for ensuring that the staffing structure outlined in the contract is maintained. Commonwealth Corporation will not approve a modification to add additional funds to staffing in order for the grantee to maintain the staffing structure included in the contract. Therefore, we encourage all grantees to review any significant staff changes with Commonwealth Corporation prior to making the change to ensure an adequate staffing structure is maintained. Applicants should factor in any proposed increases over the grant period into the average hourly rate.

Fringe: This line item is for fringe benefits for internal staff. The budget should include the percentage used to calculate the actual budgeted dollar amount. The budget should also include details about the benefits included in rate and the rate associated with each benefit.

**B.** **Other Program Costs**

Travel:This category is forlead applicantstaff travel required to achieve the project goals. The budget should include a description indicating the need for the proposed travel, destinations, and mode of travel. The budget should include the mileage rate in the column labeled “rate” and the total number of miles in the column labeled “unit.” Mileage will not be reimbursed beyond the current federally approved rates.

Space Rental**:** This category is for space rental related to project activity. If funds will be allocated on a cost allocation basis, the average monthly cost should be included in the column labeled “rate” and the duration of your grant in the column labeled “unit.” If costs will be charged on an actual cost basis the actual monthly cost of rent should be included in the column labeled “rate” and the duration of your grant in the column labeled “unit.”

Telephone & Communications**:** This category is for telephone and other communication costs related to project activity. If funds will be allocated on a cost allocation basis, the average monthly cost should be included in the column labeled “rate” and the duration of your grant in the column labeled “unit.” If costs will be charged on an actual cost basis the budget should include the actual monthly cost of telephone & communications in the column labeled “rate” and the duration of your grant in the column labeled “unit.”

Equipment Rental & Lease**:** This category is for rental or lease of office equipment necessary for implementation of the project. The budget should include a list of items to be leased. If funds will be allocated on a cost allocation basis, the average monthly cost should be included in the column labeled “rate” and the duration of your grant in the column labeled “unit.” If costs will be charged on an actual cost basis include the actual monthly cost of equipment rentals in the column labeled “rate” and the duration of your grant in the column labeled “unit.”

Equipment Purchase**:** This category is for equipment purchases. The budget should include a list of items to be purchased. The budget should include the cost of the item in the column labeled “rate” and the total number of units that will be purchased in the column labeled “unit.”

Postage & Mailings**:** This category is for postage and mailing related to project activity. The budget should include a description of the use of these funds. If funds will be allocated on a cost allocation basis, the budget should include an average monthly cost in the column labeled “rate” and the duration of your grant in the column labeled “unit.” If costs will be charged on an actual cost basis over the duration of the grant, the budget should include the total cost of postage in the column labeled “rate” and fill in a number “1” in the column labeled “unit.”

Publication/Print/Copying**:** This category is for publication, printing and copying related to project activity. The budget should include a description of the use of these funds. If funds will be allocated on a cost allocation basis, include an average monthly cost in the column labeled “rate” and the duration of your grant in the column labeled “unit.” If costs will be allocated on an actual cost basis over the duration of the grant, include the total cost of publication, printing and copying in the column labeled “rate” and fill in a number “1” in the column labeled “unit.”

Meeting Expenses**:** This category is for meeting expenses related to project activity. The budget should include a description of the use of these funds. The budget should include a meeting cost rate in the column labeled “rate” and the total number of meetings that will be held over the duration of your grant in the column labeled “unit.”

Office Supplies & Materials**:** This category is for office supplies related to project activity. The budget should include a description of use of these funds. If funds will be allocated on a cost allocation basis, the budget should include an average monthly cost in the column labeled “rate” and the duration of your grant in the column labeled “unit.” If costs will be charged on an actual cost basis over the duration of the grant, the budget should include the total cost of office supplies & materials in the column labeled “rate” and fill in a number “1” in the column labeled “unit.”

Marketing & Advertising**:** This category is for marketing and advertising related to project activity.

The budget should include a description of use of these funds. The budget should include the cost of the advertisement in the column labeled “rate” and the number of times you plan to run the advertisement in the column labeled “unit.”

Training Materials**:** This category is for expenses related to the purchase of training materials related to project activity. The budget should include a description of the training materials. The budget should include the cost per unit of the training materials in the column labeled “rate” and the cost per unit in the column labeled “unit.”

**C. Support Services**

Training Stipend: This category is for stipends paid to participants during their participation in classroom training. The budget should include the amount of the stipend in the column labeled “rate” and the total number of participants anticipated to receive the stipend in the column labeled “unit.”

Work Experience: This category is for wages and stipends paid to participants or wage subsidies paid to employers during work experience, including on-the-job training. The budget should include a description of the type of compensation (stipend, hourly wage for internship, wages for on-the-job training) and the number of weeks of employment. The budget should include the total maximum compensation that will be paid to or in the case of a wage subsidy, on behalf of each participant under the column labeled “rate” and the total number of participants anticipated to receive the stipend in the column labeled “unit.”

Transportation**:** This category is for transportation expenses related to the support of participants during training. The budget should include a description of the use of funds. The budget should include the average amount that will be provided per participant in the column labeled “rate” and the total participants in the column labeled “unit.”

Participant Tuition & Fees**:** This category is for tuition and fees associated with training slots for one or more participants. The budget should include the cost per participant in the column labeled “rate” and the total number of participants in the column labeled “unit.” Any costs that the applicant will contractually agree to pay a training provider for group instruction should not be included in this line item and should be included in the training contractors’ line item.

Flexible Funding / Other: This category is for other expenses related to the support of participants during training such as flexible funding to cover participant emergencies and other barriers to program and job retention. The budget should include a description of the use of funds. The budget should include the average cost per participant in the column labeled “rate” and the total number of participants in the column labeled “unit.”

**D. Contracted Services**

Training Contractors: This category is for project costs related to training services provided to the grantee on a contract basis by individuals, organizations or companies that are subcontractors or consultants to the grantee.

If the cost of the course is negotiated at an hourly rate, the budget should include the hourly rate in the column labeled “rate” and the total number of instructional and preparation hours in the column labeled “unit.” If the cost of the course is negotiated at a course-based rate, the budget should include the total cost of the course in the column labeled “unit” and the number of times the course will be offered in the column labeled “rate.” If rates vary by course, each course should be listed in a separate row. At a minimum each training provider should be listed on a separate line.

Curriculum Development Contractors: This category is for project costs related to the development of curricula. The budget should include a description of the use of funds including the name of the organization or individual that will be contracted to develop the curricula and the new courses that will be developed. The budget should include the hourly rate in the column labeled “rate” and the number of hours that will be spent developing the curricula in the column labeled “unit.”

Other Contractors:This category is for expenses related to other contracted services, including any contracted services to fulfill required staffing roles. The budget should include a description of the use of funds including the name of the organization or individual that will be contracted to perform this service. The budget should include the hourly rate in the column labeled “rate” and the quantity of hours each task will require in the column labeled “unit.” Each contractor should be listed on a separate line.

**E. Indirect Costs** This category is for indirect costs. Indirect costs are costs incurred for common or joint objectives that are not easily identifiable to a single grant and benefit multiple programs. Grantees must apply indirect costs through the use of an approved indirect cost rate or an approved cost allocation plan. A copy of the cost allocation plan must be supplied during contract negotiations. Any changes to this plan must be submitted to Commonwealth Corporation for the duration of the grant.

Part 6: Outcome Chart

**General Instructions:** The outcome chart must be submitted using Part 6 provided in the MS Excel file format. This form summarizes the key anticipated outcomes for the proposed project. These outcomes will be incorporated into the final contract. In addition to the outcomes listed here, grantees will be required to collect other information about participant demographics, wages, and other project results.

Please enter goals under the column labeled “goal.” Then show the anticipated distribution of goals by quarter by entering the cumulative goal per quarter under each corresponding quarter. We have programmed formulas that will automatically calculate the performance rates under the column labeled “rate” for each performance measure.

**Section I: Enrollment & Completion Goals:**

1. *Number of participants enrolled in training program:* Please enter the total number of participants that will be enrolled in the training program and the anticipated cumulative total number by quarter.
2. *Number of participants completing training program:* Please enter the total number of participants that will complete the training program and the anticipated cumulative total number by quarter.
3. *Number of participants earning an industry recognized credential as a result of training:* Please enter the total number of participants that will earn an industry recognized credential as a result of training and the anticipated cumulative total number by quarter. If the industry does not recognize or require an industry recognized credential and the proposed program design does not result in an industry recognized credential leave this field blank.

**Section IIA: New Employment Goals:** should be completed for un/underemployed participants.

1. *Number of participants placed in unsubsidized employment who retain it for at least 30 days:* For this question, enter the number of un/underemployed that will obtain a job and retain it for at least 30 days during the period of the grant and the anticipated cumulative total by quarter.
2. *Average hourly wage at placement:*Please enter the anticipated starting hourly wage at placement for participants that will be placed in training related unsubsidized employment.

**Section IIB: Wage Increase Goals:** should be completed for incumbent worker participants.

1. *Number of incumbent worker participants that will receive a wage increase as a result of training:* Each applicant must have wage increase goals from their specific employer partners. For this question, enter the number of incumbent worker participants that will receive a wage gain at their current employer as a result of training at each employer partner during the period of the grant. A one-time bonus or cost of living adjustments should not be counted toward this performance measure.
2. *Average hourly wage increase:* Please enter the amount of the anticipated average hourly wage increase that individuals receiving a wage increase will receive. Please enter a dollar amount, not a percent. While we have not set a baseline goal this year, we expect applicants to set a realistic target and provide sufficient rationale for their proposed benchmark, which is subject to negotiation.

Part 7: Sample Memorandum of Agreement

**(*NAME of Partnership*)**

**I. Purpose of This Memorandum**

This Memorandum of Agreement (MOA) outlines the agreement among the partners listed below. Partners are committed to implementing a program design that includes the following features:

* Involvement of business partners in designing assessment/screening protocols and in developing training program curricula to ensure that they are aligned with entry requirements for jobs;
* Case management to ensure participants find and remain in jobs after completing the training program;
* Strategies that address enrollment, occupational and academic skills instructions, job development, and job placement for the specific identified target population and target occupation(s); and
* Hiring/wage increase commitments (not required)

**II. Term**

This MOA shall be in effect from \_\_\_\_\_\_\_\_\_\_and shall end on\_\_\_\_\_\_\_\_\_\_. This MOA may be terminated prior to the effective end date upon the full written approval of all the partners.

**III. Partners**

List the names of each partner participating in your Industry Cluster Partnership.

**IV. Common Roles & Expectations of Partners**

**All Parties agree to (examples):**

1. Have a representative attend and participate in Advisory Board meetings.
2. Communicate consistently through e-mail and phone calls, reading all relevant e-mails, listening to voice mail messages and responding in a timely manner.
3. Work together to solve problems, make decisions, create opportunities for program participants, and support participants’ success.
4. Hold participants to program standards
5. Deliver consistent messages, and provide a structured, safe learning environment.

**V. Individual Partner Roles & Expectations**

Outline the specific roles and expectations of each partner, which may include:

* Coordinate program logistics and oversee day-to-day operations.
* Provide career readiness training and ensure completion of all work readiness.
* Handle all fiscal and data requirements for the grant.
* Help recruit individuals who are a good fit for the program
* Support participants in addressing challenges outside of the program that might interfere with their success in the program.
* Provide teachers, space and equipment for teaching occupational skills.
* Provide paid work experience.
* Evaluate participants and provide honest feedback to and all partners about participants’ progress.
* Participate in the design of assessment/screening protocols and training program curriculum to ensure graduates of the program meet hiring standards.
* Provide participant level data to the lead applicant
* Provide the talents and support of hiring managers to design a program that will meet their workforce needs and lead to job placements and advancements

***(The following is not required from businesses, but provides an outline of what a detailed commitment might look like)***

*For programs proposing to place participants into a job:*

(business name) agrees to identify hiring managers to participate in the design of assessment/screening protocols and training program curriculum to ensure graduates of the program meet hiring standards.

(business name) agrees to interview (number of graduates to be interviewed) graduates within two weeks of program graduation for open positions as (target occupation title) at our (location) location.

(business name) agrees to hire (number of graduates to be hired) graduates at an average starting hourly wage of (average starting hourly wage).

*For programs proposing to prepare participants for advancement with their current employer:*

(business name) agrees to participate in the design of assessment/screening protocols and training program curriculum to ensure graduates of the program meet criteria to be eligible for advancement.

(business name) agrees to provide a wage increase to (number of graduates to receive wage increase) at an average hourly increase of (average amount of hourly increase in dollars). This wage increase will occur (specific point in time or benchmark-such as the attainment of a credential-when the wage increase will be awarded).

**V. Signatures**

Have each partner’s representative sign and date the MOA. Make sure the signatories have contractual authority for their organization.

**Partner Organization Name**

**Signatory Name**

**Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date: \_\_\_\_\_\_\_\_\_\_\_\_\_**

**Partner Organization Name**

**Signatory Name**

**Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date: \_\_\_\_\_\_\_\_\_\_\_\_\_**

Part 8: Certificate of Good Standing from the MA Dept. of Revenue

All lead applicants\* must submit a Certificate of Good Standing from the Massachusetts Department of Revenue. This should be included in your Qualifications Submission Package and labeled Part 8. **\*Please note that community colleges, public vocational technical high schools, and public state universities serving as the lead applicant do not need to submit a Certificate of Good Standing. Organizations in this category should upload a brief document stating this exemption.**

Please follow this guidance when requesting and submitting a Certificate of Good Standing:

* The **Certificate of Good Standing (C.O.G.S.)** is **NOT** the same as and should not be confused with a **Certificate of Incorporation** from the Secretary of State
* C.O.G.S. must be less than six months old
* Please visit the Department of Revenue’s website:

(<http://www.mass.gov/dor/businesses/programs-and-services/certificate-of-good-standing.html>) for more information about the C.O.G.S. and to complete an online application to obtain a Certificate

* Applications for a C.O.G.S. can take 4-6 weeks to be processed

Part 9: Certification

***^This form is required to be attested to digitally on application portal upon submission****.*

|  |
| --- |
| **Statement of Tax Compliance:**  Pursuant to M.G.L., c62C, s.49A, I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, signing on behalf of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ , certify that under the pains and penalties of perjury that the aforementioned business organization has filed all state tax returns and paid all taxes as required by law.  **Certification of Compliance with Filing Requirements:**  I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, on behalf of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ aforementioned Lead Applicant, certify that said Lead Applicant has filed with the appropriate town or city clerk; or officer of the Commonwealth, and paid any required fees pursuant to the Massachusetts General Laws as regards partnerships and/or corporations doing business in the Commonwealth.  **Certification:**  I hereby certify that the information provided in this application is accurate and that I am duly authorized/empowered to sign contracts on behalf of this organization.  FULL NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  TITLE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

1. <https://www.mass.gov/service-details/view-your-regions-blueprint> [↑](#footnote-ref-1)
2. Contracts will be issued for up to two years unless the duration of the training required for entry into the target occupation requires additional time and, in that case, the applicant may request up to a three-year grant duration. For example, an applicant proposing a two-year associate’s degree program may request up to three years. However, a program proposing to deliver an eight-week training program may provide multiple cohorts over a maximum period of two years. [↑](#footnote-ref-2)
3. See previous footnote above #2. [↑](#footnote-ref-3)
4. <https://www.mass.gov/service-details/view-your-regions-blueprint> [↑](#footnote-ref-4)
5. Governor Baker established the Workforce Skills Cabinet (WSC) through an Executive Order to create a convening body to align programs and policies across the Executive Office of Labor and Workforce Development, the Executive Office of Education, and the Executive Office of Housing and Economic Development to support a comprehensive economic growth agenda and workforce strategy to meet employer needs. The WSC has established a common agenda for making public investments that includes supporting initiatives that address the following priorities: demand-driven, leverage partnerships, reflect regional plans, maximize increases in skilled workers, support chronically under and unemployed individuals, leverage other state and federal funding, and build on proven programs and sustainability. [↑](#footnote-ref-5)
6. <http://www.mdrc.org/publication/implementing-workadvance-model> [↑](#footnote-ref-6)
7. <https://www.mass.gov/service-details/view-your-regions-blueprint> [↑](#footnote-ref-7)
8. Governor Baker established the Workforce Skills Cabinet (WSC) through an Executive Order to create a convening body to align programs and policies across the Executive Office of Labor and Workforce Development, the Executive Office of Education, and the Executive Office of Housing and Economic Development to support a comprehensive economic growth agenda and workforce strategy to meet employer needs. The WSC has established a common agenda for making public investments that includes supporting initiatives that address the following priorities: demand-driven, leverage partnerships, reflect regional plans, maximize increases in skilled workers, support chronically under and unemployed individuals, leverage other state and federal funding, and build on proven programs and sustainability. [↑](#footnote-ref-8)