

**Request for Proposals for the**

**2020-2021**

**Senator Kenneth J. Donnelly**

**Workforce Success Grants for Expanded Training Capacity & Employment Program Performance**

***Funded through the Workforce Training Fund Program Allocation to the***

***Workforce Competitiveness Trust Fund***

**Issued by**

**Commonwealth Corporation**

**RESPONSES DUE:** August 7, 2020 by 5:00 PM

Upload electronic submission to the following link:

[**https://commcorp.tfaforms.net/328840**](https://commcorp.tfaforms.net/328840)

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**2020-21 Workforce SuCCESS GRANTS FOR**

**EXPANDED TRAINING CAPACITY & EMPLOYMENT PROGRAM PERFORMANCE**

**REQUEST FOR PROPOSALS**

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**Workforce SUCCESS GRANTS FOR EXPANDED TRAINING CAPACITY & EMPLOYMENT PROGRAM PERFORMANCE**

**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.

In 2018, the Massachusetts Legislature voted to rename grant awards from the WCTF in memory of the late Senator Kenneth J. 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 recognition of the steadfast advocacy efforts of workforce development groups in the state, this economic development bill also amended the originating legislation of the Workforce Training Fund to allocate up to 5 per cent of the annual capitalization of the Workforce Training Fund to provide for future, performance-based Workforce Success Grants through the WCTF program model (SECTION 8. Subsection (b) of section 2RR of chapter 29 of the General Laws).[[1]](#footnote-1),[[2]](#footnote-2)

This Request for Proposals (RFP) represents the initial disbursement of these training funds and is offered under the WCTF moniker. This grant initiative is administered by Commonwealth Corporation on behalf of the Executive Office of Labor and Workforce Development.

1. ***About the Grant Initiative Goals:*** The *Senator Kenneth J. Donnelly Workforce Success Grants for Expanded Training Capacity & Employment Program Performance (WSG-ETCEPP)* will support additional seat capacity in ongoing sector-based employment programs that provide training and job placement and retention services to unemployed Massachusetts residents. Commonwealth Corporation seeks to fund proposals from qualified organizations that propose to enroll additional unemployed Massachusetts residents in their existing **training and placement** programs primarily within occupational priorities identified through the Regional Workforce Skills Planning Initiative regional blueprint process,[[3]](#footnote-3) such as Advanced Manufacturing, Healthcare, Information Technology, or other specific regional priorities.
2. ***Target Populations:*** Grant funds may be used to train Massachusetts residents who are unemployed. Please see Section 3 for more information.
3. ***Funding Availability*: ~**$1.13 million is available for this grant program. Please see Section 5 for more information.
4. ***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.
5. ***Duration of Contract(s)*:** Contracts will be issued for a period of approximately one year with the option to extend into future years pending consistent service delivery and program performance.
6. ***Overview of Performance-Based Payments:*** Contracts issued through the Workforce Success Grants for Expanded Training Capacity & Employment Program Performance solicitation will be paid on a performance basis in accordance with the originating legislation.[[4]](#footnote-4) Payments will be contingent upon program enrollments and job placement and retention outcomes, with 50% of the grant award allocated toward each milestone. Specifically, payment per participant for each milestone will be calculated based on the total planned enrollments and job placements identified on the Outcome Chart (Part 6).

Grantees will be required to submit standard invoices documenting the number of participants that have reached each milestone. An individual must have attended a minimum of 75% of the scheduled class days for a two-week period in order to qualify the organization for an enrollment payment. An individual must have retained continuous employment in an unsubsidized, training-related position requiring not less than 30 hours per week for two months with the same employer in order to qualify the organization for a job placement payment.

The lead organization will regularly submit invoices using an agreed upon template provided by Commonwealth Corporation upon contract start-up. Grantees will only be paid for expenses incurred during the period of the contract. Additionally, we have set an average target wage floor of $14.25 per hour.

1. ***Application Deadline*:** Applications are due on August 7, 2020 by 5:00 PM. We do not require a letter of intent to apply; however, we strongly 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](mailto:abritt@commcorp.org) from the date of release through one week prior to the submission deadline. Please see Section 6 for more information.
2. ***Schedule:***

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Request for Proposals Released | June 25, 2020 |
| Deadline to Submit Written Questions | July 31, 2020 |
| All Answers to Questions Posted Online | August 4, 2020 |
| Responses (Proposals) Due | August 7, 2020 by 5:00 PM |
| Applicants Notified of Status (Anticipated) | Late September 2020 |
| Anticipated Contract Start Date  (Tentative – provided for planning purposes) | Earliest Permitted: October 1, 2020  Latest Permitted: January 1, 2021 |
| Anticipated Contract End Date  (Tentative – provided for planning purposes) | Latest Permitted: December 31, 2021 |

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

|  |  |
| --- | --- |
|  | **Pipeline Training and Job Placement Program** |
| ***Maximum Grant Award*** | Up to $200,000 for a 1-year, performance-based grant award. |
| ***Target Population*** | To train and place unemployed Massachusetts residents into occupations that are in high demand by employers in a specific region. |
| ***Target Occupation*** | An occupation within health care, information technology cluster, advanced manufacturing or another sector that is identified as critical or priority in the regional blueprint for the lead applicant’s region.  *Applicants MAY propose to provide training in multiple occupations.* |
| ***Baseline Partnership Requirements*** | Minimum of two employers that have operations in Massachusetts and demonstrated vacancies in the target occupation(s) who are interested in using the program to fill their vacancies by hiring new individuals. If applicants propose to provide training in multiple occupations, they must have two employer partners with demonstrated vacancies in each proposed occupation. If applicable, the relevant union must be included. |
| Applicants are encouraged to partner with their local MassHire Workforce Board and Career Center for recruitment support and other workforce development supports.  Applicants are also encouraged to ensure they have collectively engaged a partnership consisting of the relevant parties necessary to continue to operate a successful program. |

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. ***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 programming for unemployed people, including but not limited to 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 job placement opportunities for participants. 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***.
  + ***Unions:*** *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 **are encouraged but not required to 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. ***If included, 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 **are encouraged but not required to 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. ***If included, 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. ***If included, these partners must sign a MOA or letter***.

Section Three: Training Program Design Requirements

1. ***Target Sector / Occupation:*** Applicants must provide job training, placement, and support services that prepare unemployed 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.

*Unlike our cohort-based RFP released in February 2020, we are also interested in funding partial cohorts and individual program seats within an organization’s existing training program. We are also allowing applicants to propose program seats across more than one occupational area. Applicants that propose to provide additional program seat capacity in a second occupation must demonstrate they have at least two additional employer partners with demonstrated vacancies in the proposed occupation in order to satisfy the grant program requirements.*

In either case, applicants must identify a target region and include information about unmet demand for workers for the proposed target occupation(s). 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.

Eligible target occupations include the following:

* + an occupation within the IT cluster, health care, or advanced manufacturing, 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 provide flexibility while also facilitating 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.[[5]](#footnote-5),[[6]](#footnote-6)

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[[7]](#footnote-7) 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 (defined as at least 30 hours per week)
* 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. ***Target Population:***Grant funds must be used to train Massachusetts residents who are unemployed. An unemployed individual is defined as an individual who is not currently employed upon the time of program enrollment. This definition may include unemployed individuals who are permanently separated Unemployment Insurance claimants who do not have a return to work date. For the purposes of this RFP, programs may not seek funding to increase program enrollment for “underemployed” participants.

Given uncertain times and turbulent economic conditions that have drastically altered the level of unemployment across the Commonwealth, we think it is important to reiterate the intent of the WCTF in the context of this environment. The purpose of the WCTF is to support the 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 may 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. We anticipate making awards that expand the capacity of Massachusetts-based organizations to serve people who reflect the demographic makeup of their communities while meeting employer demand.

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

* 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 pre-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 successful 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. ***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. ***Performance-Based Outcome Expectations:*** Contracts issued through the Workforce Success Grants for Expanded Training Capacity & Employment Program Performance solicitation will be paid on a performance basis in accordance with the originating legislation.[[8]](#footnote-8)

Proposals will be evaluated largely based on consistently strong past program performance. A strong proposal will demonstrate the program components necessary to achieve the following rates for completion and job placement (measured at 2 months retention):

* At least **85**% of enrolled unemployed participants will complete training.
* At least **75**% of unemployed participants who enroll in training will be placed in an unsubsidized, training-related job requiring not less than 30 hours per week for two months with the same employer.

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. Applicants will provide a detailed budget to illustrate the true costs of their program and propose a set of outcome metrics including enrollments, completions, credential attainment, and job placements with 2 months retention that are in line with past performance outcomes trends.

Section Four: Administrative Requirements

1. ***Performance-Based Payment Structure:*** Contracts issued through the Workforce Success Grants for Expanded Training Capacity & Employment Program Performance solicitation will be paid on a performance basis in accordance with the originating legislation.[[9]](#footnote-9) As refenced in Section Three, we are not setting specific cost figures; instead, we are seeking to fund qualified applicants who propose an overall cost that is accurate, reasonable, and reflective of the funding level needed to result in the placement of unemployed job seekers.

Upon successful award, performance-based enrollment and job placement payments will be established for each awardee based on their unique set of services delivered and their proposed outcomes calibrated to their proposed target population and based on their historical performance rates as indicated in the initial grant application. The performance-based payment structure will include payments that are contingent upon program enrollments and retained job placements, with 50% of the grant award allocated toward each milestone. Specifically, the payment per participant for each milestone will be calculated based on the total planned enrollments and job placements identified on the Outcome Chart (Part 6).

The lead organization will be required to submit standard invoices documenting the number of participants that have reached each milestone. An individual must have attended a minimum of 75% of the scheduled class days for a two-week period in order to qualify the organization for an enrollment payment. An individual must have retained continuous employment in an unsubsidized, training-related position requiring not less than 30 hours per week for two months with the same employer in order to qualify the organization for a job placement payment.

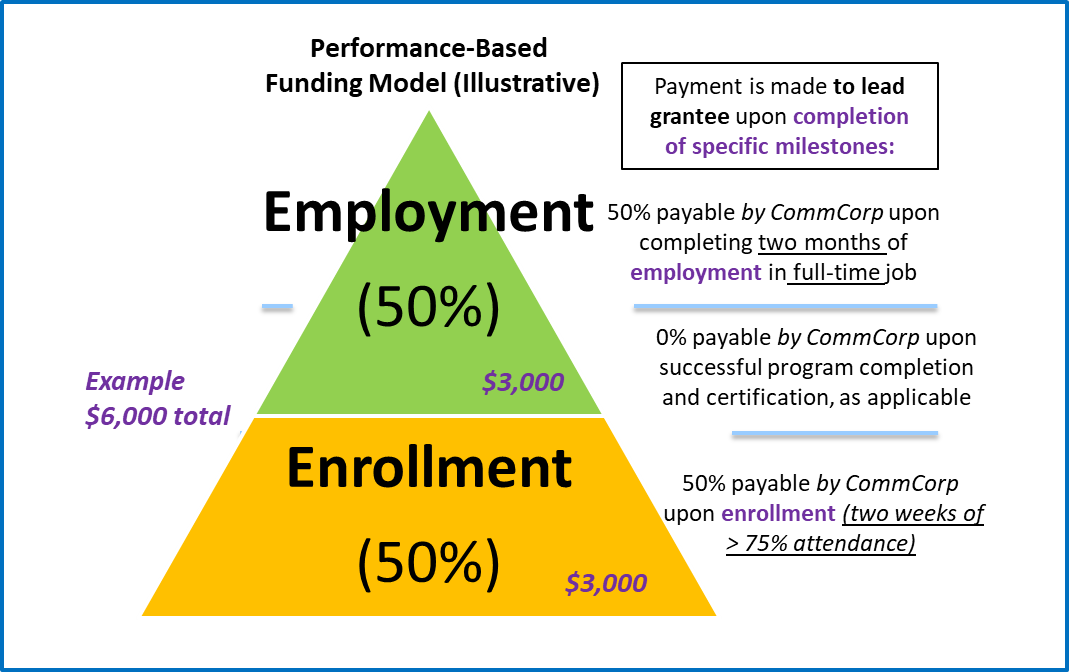


Figure Example Program Payment Structure

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 and retention information upon 2 months of retention.

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, placement wages, 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.

As referenced in Section Three, Commonwealth Corporation will fulfill this responsibility by reviewing participant-level documentation as back-up for the performance-based payment system. We are not seeking to track line item program expenses. Additional information will be provided after a contract is awarded.

1. ***Technical Assistance:*** Each applicant awarded funding 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. ***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.
3. ***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.

Section Five: Available Funding & Allowable Costs

1. ***Funding Availability & Grant Award Amount:*** ~$1.13 million is available for this grant program. Individual grant awards will not exceed $200,000. Contracts will be issued for a period of approximately one year with the option to extend into future years pending consistent service delivery and program performance.
2. ***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
* Equipment costs
* Rent and associated operating costs not charged to the grant
* Other expenses related to program implementation

1. ***Allowable Costs:*** *Applicants should outline their overall budget knowing that the contractually negotiated payment structure will be based on the cost per participant figures derived from the budget rather than specific line item calculations. We recognize that each proposed training program will have varied costs based on target population, target occupation, program length, and other unique characteristics, etc. For example, if an applicant proposes to serve a population that requires more intensive and/or longer duration of services to be successful, applicants should provide a clear explanation of their true program 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, childcare, 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. ***Equipment:*** It is expected that partnerships will utilize existing capacity to deliver training programs, including existing equipment that can be used to provide virtual or hands-on training to participants.

Section Six: Submission Schedule & Instructions for Submission

1. ***Submission Schedule:***

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Request for Proposals Released | June 25, 2020 |
| Deadline to Submit Written Questions | July 31, 2020 |
| All Answers to Questions Posted Online | August 4, 2020 |
| Responses (Proposals) Due | August 7, 2020 by 5:00 PM |
| Applicants Notified of Status (Anticipated) | Late September 2020 |
| Anticipated Contract Start Date  (Tentative – provided for planning purposes) | Earliest Permitted: October 1, 2020  Latest Permitted: January 1, 2021 |
| Anticipated Contract End Date  (Tentative – provided for planning purposes) | Latest Permitted: December 31, 2021 |

1. ***Clarification Period*:** Questions about this grant program will be accepted in writing from the release date through July 31, 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/328839**](https://commcorp.tfaforms.net/328839). 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 Friday, August 7, 2020. Please upload your submission electronically to the following link:[**https://commcorp.tfaforms.net/328840**](https://commcorp.tfaforms.net/328840). 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 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 10 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 performance-based, 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 measured at 2 months 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). All required employer partners’ and optional partners’ commitments, roles and anticipated activities must be provided 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.

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

All **lead applicants,** *except for community colleges, public vocational technical high schools, and public state universities,* must submit a Certificate of Good Standing (COGS) from the Massachusetts Department of Revenue.

**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** |
| 1. Track record of success and qualifications/capacity of lead applicant and partner organizations with grant management, fiscal coordination, and implementing training and employment programs that place unemployed individuals in full-time positions successfully. | 25 |
| 1. Clearly identified and articulated target occupation(s), target population, and need for additional funding as demonstrated by employer demand and community need. | 15 |
| 1. Strong evidence, including clearly articulated MOA/letters, of employer engagement and community partnerships, such as an overall job placement strategy that is likely to result in job placement and retention for program participants. | 15 |
| 1. Clear program model that addresses the required program design elements and services that are appropriate to prepare the proposed target population for employment in the target occupation(s). | 15 |
| 1. Budget aligns with the proposed program design and the proposed number of enrollments seems reasonable given program expenses. | 15 |
| 1. The number of individuals the applicant is proposing to place in employment seems appropriate and realistic given proposal narrative. | 15 |

***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 based on the schedule in Section 6A.

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 previously described funding source 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 Christine Abrams, 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 [online]

# Appendix A: Target Occupation Regional Priority Chart

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

\*While applicants may propose to target an IT, Healthcare, or advanced manufacturing 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 a more robust partnership. The MassHire Workforce Board in your region may have also included additional industries as “critical but not prioritized” or have a more recent listing.

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 | | | | |
| **Training Program Name^:** | |  | | | | | |
| **Cities and Towns Served by Program^:** *(up to 3 or WB region)* | |  | | | | | |
| **Target Industry and Occupation^:** | | IT: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Health Care: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Advanced Manufacturing: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | |
| **Target Industry and Occupation (if proposing a secondary option)^:** | | Other: \_\_\_\_\_\_\_\_\_\_\_\_\_ | | **Proposed Grant Start Date:** | | |  |
| **Proposed Grant End Date:** | | |  |
| **Total Program Funds Requested^:** *(up to maximum $200,000)* | | **$** | | **Proposed # Enrollments^:** | | |  |
| **Proposed # Placements^:** | | |  |
| **2. PROGRAM SUMMARY**  *In the space provided below, please provide a brief summary of your proposal in* ***no more than*** ***400 words****. Please keep in mind that if your application is awarded funding, this summary will be used in public announcements.* | | | | | | | |
|  | | | | | | | |
| **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, as applicable. All partner whose information is listed below must be included on a MOA/letter 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 order to be eligible for funding.* | | | | |
| **Organization Type** | **Organization Name** | **Address** | **Contact Name / Title** | **Phone / Email** |
| **Employer Partner 1\*** |  |  |  |  |
| **Employer Partner 2\*** |  |  |  |  |
| **Example: MassHire Workforce Board** |  |  |  |  |
| **Example: MassHire Career Center** |  |  |  |  |
| **Example: Training Provider** |  |  |  |  |
| **Example: Community -Based Org.** |  |  |  |  |
| **Example: Local Office of Public Agency** |  |  |  |  |
|  |  |  |  |  |

Part 2: Training and Placement 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 10 pages (an additional 5 pages permitted if proposing a second training program with a different target occupation). 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. ***Track Record and Past Performance***

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

1. How many times have you delivered this same or similar program before? If so, please provide information about the funding source and the dates the program was offered.
2. Baseline: Assuming there is funding currently available to deliver this same program over the same time period covered by this grant program (approx. October 2020-December 2021), how many cohorts are planned for this year? How many participants are intended to be served?
3. Added Capacity: If selected for funding, how many additional cohorts/participants will this grant support? For the purposes of this program, we are not interested in replacing existing funding.
4. Please fill in the following chart to provide a brief snapshot of your past performance in operating this specific training program. We are interested in learning about the past 2-5 years of performance data.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***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 if funded through a training grant?
2. ***Partnership Staffing and Engagement***

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

1. 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. If applicable, please clearly indicate which specialized positions will need to be hired for this grant program.
6. ***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 Three and the regional demand for this target occupation by addressing the following points:
7. What is the geographic area you are proposing to serve?
8. Which occupation will your program prepare participants for?
9. What labor market problem are you seeking to solve and how do you anticipate the impact of COVID-19 will shape your training program going into 2021?
10. 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?
11. 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 10/1/2020 – 12/31/2021):

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **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 Three 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 Three).
3. Provide an explanation of why your chosen population is an appropriate fit with the target occupation(s).
4. Describe the track record and experience of partnership member organizations in recruiting and working with the target population.
5. 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.

1. ***Unemployed Training and Placement Program Design:*** This section asks for more detail about the program design that will be implemented to serve the specific target populations you are proposing to serve. Please answer all questions regarding the program.
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?

How will you adapt your training program delivery to be responsive to current and emerging needs in the context of COVID-19 social distancing guidelines and restrictions?

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 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, childcare, 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?

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** | **Planned # of Additional Grant-Funded Enrollments** | **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 in 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 into a new job. Reviewers will use these calculations in conducting a cost benefit analysis.

***Please see Section Five for additional guidance regarding budget and payment structures.***

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

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. 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 using 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 order to structure performance-based payments. 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:**

1. *Number of participants placed in unsubsidized employment who retain it for at least 2 months:* For this question, enter the number of unemployed who will obtain a training-related job requiring not less than 30 hours per week for two months with the same 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.

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).

**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

1. WTFP: <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIII/Chapter29/Section2RR> [↑](#footnote-ref-1)
2. WCTF: <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIII/Chapter29/Section2WWW> [↑](#footnote-ref-2)
3. <https://www.mass.gov/service-details/view-your-regions-blueprint> [↑](#footnote-ref-3)
4. <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIII/Chapter29/Section2RR> [↑](#footnote-ref-4)
5. <https://www.mass.gov/service-details/view-your-regions-blueprint> [↑](#footnote-ref-5)
6. 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-6)
7. <http://www.mdrc.org/publication/implementing-workadvance-model> [↑](#footnote-ref-7)
8. <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIII/Chapter29/Section2RR> [↑](#footnote-ref-8)
9. <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIII/Chapter29/Section2RR> [↑](#footnote-ref-9)