



GREATER LOWELL WORKFORCE BOARD

REQUEST FOR PROPOSALS FOR YOUTH PROGRAMMING

**U.S. Department of Labor
Workforce Investment & Opportunity Act (WIOA)
IN-SCHOOL AND OUT-OF-SCHOOL YOUTH**

FOR FISCAL YEAR 2025 (7/1/2024 – 6/30/2025 With Potential Renewal for FY'26)

RFP available at: <https://masshiregreaterlowell.com/>

ISSUE DATE
March 25, 2024
BIDDER'S CONFERENCE
4/4/2024 – Thursday 10:00AM-11:00AM
Deadline for Proposal Questions
4/16/2024 - Tuesday by 4:30PM
Proposal Submission Deadline
5/7/2024 – Tuesday by 11:00AM

**MassHire Greater Lowell Workforce Board
107 Merrimack Street – 3rd Floor
Lowell, MA 01852**

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I. Background and General Information

Services Solicited by this Procurement

The MassHire Greater Lowell Workforce Board (MHGLWB) is seeking providers who will singularly or collaboratively provide comprehensive services for WIOA eligible youth between the ages of 16-24 who reside within the City of Lowell and the following 7 towns: Billerica, Chelmsford, Dracut, Dunstable, Tewksbury, Tyngsboro and Westford. This area is collectively known as the Greater Lowell Workforce Development Area.

The MHGLWB is seeking innovative proposals for programs that will perform recruitment and outreach, intense case management, paid and unpaid work experiences, career readiness activities, career pathway activities, educational activities assisting with the attainment of a High School Diploma, High School Equivalency (HiSET/GED), occupational skills training leading to an industry recognized credential, financial literacy activities, self and career assessments, follow-up services for one year after program exit. Successful bidders will offer year-round programs that directly address the barriers facing our young people.

Workforce Innovation and Opportunity Act Overview (WIOA)

The Workforce Innovation and Opportunity Act (WIOA) was signed into law on July 22, 2014 and is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. WIOA emphasizes servicing youth within a year-round comprehensive workforce development system that is outcome based and is built on services around a set of fourteen required program elements.

Successful proposals will be funded through WIOA. Performance and full compliance with federal, state, and local statutes, including all terms of the contract will be monitored and executed by the MHGLWB. For more information and a copy of the WIOA regulations go to <http://www.doleta.gov/wioa/>.

About the MassHire Greater Lowell Workforce Board (MHGLWB)

The MHGLWB is one of 16 Workforce Boards throughout Massachusetts, servicing the communities of Billerica, Chelmsford, Dracut, Dunstable Lowell, Tewksbury, Tyngsboro, and Westford. We are charged with overseeing and implementing workforce development initiatives throughout the Workforce Development Area. Board members offer a wide range of skills and experience and include representatives from local businesses, educational Institutions, community-based organizations, labor unions, governmental agencies, and economic development. The MHGLWB, in partnership with the City of Lowell, oversees a variety of workforce development activities, representing a multitude of federal and state funding sources. These sources include Youth, Adult and Dislocated Worker programs funded by the Workforce Innovation and Opportunity Act (WIOA), School to Career Initiatives, and other specially funded workforce development initiatives.

Target Populations

The Workforce Innovation and Opportunity Act (WIOA) serves two youth participant populations: In-School and Out-of-School youth.

For the purposes of this RFP, the target population, **in-school youth, is defined as youth between the ages of 16-21 enrolled in secondary education, including alternative and vocational schools**, low income and has at least one barrier to educational and/or employment barriers. *

**Under WIOA, an In-School Youth is an individual who is: Attending school; Not younger than 14 or older than 21 at the time of enrollment*

The target population, **out-of-school youth, is defined as a youth who is not enrolled in any school, between the ages of 16-24**, and have at least one significant barrier to educational and employment outcomes.

II. General Conditions & Terms

Available Funding/Period of Performance

At the issuance of this RFP, funding amounts for fiscal year 2025, beginning July 1, 2024 and ending June 30, 2025, have not yet been made available. The materials in this RFP are designed to give the bidder a general scope of funding available. For the purpose of this request for proposals, we are using FY23 funding levels totaling \$320,000 for all WIOA Youth as an estimate. **Approximately \$260,000 of WIOA youth funding will be dedicated to out-of-school programming.**

Terms, conditions, and specifications of this RFP are subject to change. Open and competitive procurement will occur on a two-year cycle. Contracts are awarded for a one-year period, with the possibility of a second year, based on performance and funding availability. The MHGLWB will allocate a minimum of 75% of the WIOA funds to provide activities to out-of-school youth. The final percentage will be based on the final WIOA Youth allocation and the responses received and reviewed.

Eligible Applicants (Entities that can apply for program funding)

Applicants eligible to submit a proposal(s) are: public or private agencies, public school systems, units of government, non-profit, faith based and community-based organizations, labor groups, private businesses and employers, proprietary schools, community and state colleges, post-secondary accredited schools and other qualified educational and training institutions who have demonstrated successful performance in serving youth, especially low-income youth. Proposals that demonstrate sustainable partnerships between employers, youth serving agencies, school districts and workforce/economic development partners in the provision of youth services will be given priority for funding. Facilities providing services should be accessible to persons with disabilities, and programs selected for funding must operate in full compliance with the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act of 1973.

Eligible Youth Participants (WIOA Eligibility Requirements for Youth to Participate in Programming)

At a minimum, youth must meet the following eligibility criteria which consist of providing documentation for each applicable category:

In-School Youth

1. Attending secondary school leading to the attainment of a high school diploma
2. Citizenship/Work Eligible*
3. Selective Service compliant **
4. Between 16 and 21 at the time of enrollment
5. **Low income*****
 - includes youth who receive or is eligible to receive a free or reduced-price lunch under the Richard B. Russell National School Lunch Act
 - includes youth who reside in a designated high poverty area **AND**
6. Have one or more of the following barriers:
 - a. Basic skills deficient;
 - at or below the 8.9th grade level in reading, writing, or computing skills on a generally accepted standardized test; or
 - unable to compute or solve problems, read, write, or speak English at a level necessary to function on the job, in the individual's family or in society
 - b. An English language learner
 - c. An offender
 - d. A homeless youth or a runaway, in foster care or has aged out of the foster care system
 - e. An individual who is pregnant or parenting
 - f. A youth who is an individual with a disability
 - g. A low-income***individual who **requires additional assistance** to enter or complete an educational program or to secure or hold employment. (WIOA sections 3(46) and 129(a)(1)(B).
 - Local definitions of this barrier include
 - (i). Having failed MCAS as documented by school records (ISY)
 - (ii) Having failed at least one course during any quarter of the preceding or current school year as documented by school records (ISY)

- In accordance with WIOA Sec. 129 (a)(3)(B), not more than 5% of the region's in-school youth may be an individual who requires additional assistance to complete an education program or to secure or hold employment.

Out-of-School Youth

1. Not attending any school (as defined under State law)
2. Citizenship/Work Eligible*
3. Selective Service compliant **
4. Are age 16 through 24 at time of enrollment, **AND**
5. Are one or more of the following:
 - a. School dropout
 - b. Youth within the age of compulsory school attendance, but has not attended for at least the most recent complete school year calendar quarter
 - c. An individual subject to the juvenile or adult justice system
 - d. A homeless individual, child, or youth, a runaway, in foster care or aged out of foster care, eligible for assistance under SSA section 477, or in an out-of-home placement
 - e. An individual who is pregnant or parenting
 - f. A youth who is an individual with a disability
 - g. Recipient of secondary school diploma or its equivalent who is a low-income* individual and is:
 - (i) Basic skills deficient:
 - at or below the 8.9 grade level in reading, writing, or computing skills on a generally accepted standardized test or
 - Unable to compute or solve problems, read, write, or speak English at a level necessary to function on the job, in the individual's family or in society.
 - (ii) An English language learner
 - h. A low-income***individual who requires additional assistance to enter or complete an educational program or to secure or hold employment. (WIOA sections 3(46) and 129(a)(1)(B).
 - Local definitions of this barrier include:
 - (i) Little or no successful work experience or long unsuccessful work search
 - (ii) Having quit a post-secondary program before receiving a credential or left basic training before completion

***U.S. Citizenship or Authorization to Work in the United States if a Non-U.S. Citizen**

Eligible youth must be a citizen or national of the United States, lawfully admitted permanent resident alien, refugee, asylee, and parolee, and other immigrant authorized by the Attorney General to work in the U.S.

****Selective Service**

Individuals participating in any WIOA funded program or activity must be in compliance with the Military Selective Service Act. All born males who are between the age of 18 and 26 at enrollment must register for Selective Service (50 U.S.C. App. 453). Males who are enrolled in WIOA funded programs prior to turning 18 years of age must register for Selective Service when they turn 18 to continue in WIOA activities.

Individuals can visit the Selective Service website or call 1-888-655-1825 to register or to request a Status Information Letter (SIL) to prove exemption from registering: <http://www.sss.gov/default.htm>

Gender Change and Selective Service

FEMALE TO MALE (FTM) INDIVIDUALS assigned female at birth are not required to register with Selective Service regardless of their current gender or transition status. A male who was assigned female at birth may obtain an exemption from registering with Selective Service when applying to a WIOA funded program.

MALE TO FEMALE (MTF) INDIVIDUALS assigned male at birth **are required** to register with the Selective Service within thirty days of their eighteenth birthday, including those who have transitioned before or since then.

*** A low-income individual is an individual who:

- Receives, or in past 6 months received, or is a member of a family that is receiving or in past 6 months received, assistance through the supplemental nutrition assistance program (SNAP), or the supplemental security income program established under Title XVI of the Social Security Act, or State or local income-based public assistance;
- A homeless individual;
- Receives or is eligible to receive free or reduced-price lunch (ISY only);
- A foster child on behalf of whom State or local government payments are made;
- An individual with a disability whose own income meets the low-income level for eligibility purposes;
- A youth who resides in a High Poverty Area. The Census Bureau defines a “poverty area” as a census tract where at least 25% of the residents are economically disadvantaged
- Income is at/below 70% of the Lower Living Standard (LLS), or below poverty line for a family of one
- They are dependent on the income of their parent/guardian and total family income is at or below 70% of the Lower Living Standard (LLS)

Low -income eligibility is determined by the U.S. Department of Labor; 70% Lower Living Standard Income Levels - Boston-Brockton-Nashua, MA/NH/ME/CT. (updated 2023): <https://www.doleta.gov/lisil/>

FAMILY SIZE	INCOME GUIDELINE
1	\$13,712*
2	\$22,473
3	\$30,855
4	\$38,082
5	\$44,944
6	\$52,556
Over 6 increment**	\$ 7,612

* HHS Poverty Income Guidelines and the ETA Lower Living Standard Income Levels for 2023- the higher of either the Poverty Income Guidelines or 70% of the Lower Living Standard Income Level (LLSIL) shall be used for eligibility determination for WIOA Title I and other programs using economically disadvantaged/low-income status criteria. [HHS 2021.pdf \(dol.gov\)](#)

**LLSIL: For family sizes greater than 6 subtract the LLSIL of a family of five from a family of six. Use the difference of a family of five and six as the income you will add to each income after a family of six.

Submission Date & Requirements

All proposals and modifications must be submitted **no later than May 7, 2024 at 11:00 AM EST. One (1) signed, unbound original and eight (8) bound copies of the Program Proposal and one (1) signed, unbound original and two (2) bound copies of The Price Proposal** must be delivered to:

MassHire Greater Lowell Workforce Board
107 Merrimack Street
3rd Floor
Lowell, MA 01852

For any programs applying to both an In-school and Out-of-School Program, proposals must be submitted separately, with the narrative and budget sections filled out for each. Please make sure all proposals are clearly marked as In-School or Out-of-School.

An electronic copy should be emailed to Cathleen.Sturtevant@MasshireGreaterLowell.com. Proposals must be complete and submitted in accordance with the Proposal Provisions & Requirements section of this RFP (**pg.16**). The applicant is solely responsible for assuring that anything sent to MHGLWB arrives safely and on time. Any submission to MHGLWB, including inquiries regarding the RFP, and/or proposals not received at either the specified place and/or by the specified date and time will be rejected and returned to the bidder unopened by the MHGLWB. Issuance of this RFP is coordinated by:

Kevin Coughlin, Executive Director
MassHire Greater Lowell Workforce Board
107 Merrimack Street, Lowell, MA 01852
Kevin.Coughlin@masshiregreaterlowell.com

Notification and Distribution

The RFP will be available March 25, 2024 on the MassHire Greater Lowell Workforce Board's website at www.MassHireGreaterLowell.com. Information relating to the RFP, including updates, amendments, minutes of the Bidders' Conference, and responses to questions submitted by email, will be posted to www.MassHireGreaterLowell.com. Interested applicants are responsible for monitoring the website for updates; MHGLWB does not intend to send individual notification of updates directly to applicants.

Bidders' Conference, RFP Questions and Answers

A Bidders' Conference will be held on **April 4, 2024 via live webinar at 10:00 AM**. All interested parties are strongly encouraged to participate. In order to participate, interested parties must register in advance for the webinar. To register for the webinar, please email Cathleen Sturtevant at Cathleen.Sturtevant@MasshireGreaterLowell.com. Information to register for the webinar can also be found at www.MassHireGreaterLowell.com.

Please note that to maintain a competitive bidding process, substantive questions related to this RFP will be addressed. Questions may be submitted via email to Cathleen.Sturtevant@MassHireGreaterLowell.com April 4, 2024. All questions and answers will be posted to the MHGLWB website.

Notification of Awards

The MHGLWB Proposal Review sub-committee will score and rank the proposals. The sub-committee consists of Board member volunteers who have no vested interest or benefit from the funding decisions of the MHGLWB. Those recommendations shall then be made to the full Board for final approval. MHGLWB staff will then notify the approved vendors with a letter indicating award of grant. Please note, a program/vendor that applied for both In-School and Out-of-School Youth funding could be approved for both, one, or neither proposal.

Vendors who have not been selected for funding will also be notified at this time. It is anticipated that contract awards will be made in early June with contract operations beginning on July 1, 2024, contingent upon successful contract negotiations.

MHGLWB and Proposer's Rights/Appeal Procedures

- A.** The release of this RFP does not constitute an acceptance of any offer, nor does its release in any way obligate the MHGLWB to execute a contract with any bidder. The MHGLWB reserves the right to accept or reject any offers on the basis of the general conditions set forth in this RFP, and to evaluate all accepted proposals on the criteria in this RFP.
- B.** The MHGLWB issues this RFP with the explicit understanding that minor and major changes may be made, up to and including the option to rescind this RFP in its entirety, if in the best interest of the MHGLWB.
- C.** The MHGLWB reserves the right to negotiate the final terms of all contracts with successful vendors. Items that may be negotiated include but are not limited to: type and scope of services, costs and prices, schedule of services, target groups, geographic goals, and service levels.
- D.** The proposer has the right of protest and appeal of procurement decisions. The appeal process will consist of two levels: a debriefing and an appeal:
- E.** The proposer has the right of protest and appeal of procurement decisions.
 - Proposers may request an appeal to a funding decision within (10) business days after receipt from the MHGLWB concerning funding recommendations. An appeal will NOT be accepted due to any attempts to modify or include additional information to the original application. The appeal letter should clearly state the basis of the appeal request.
 - Staff from the Greater Lowell WDB and Review Team shall then have ten (10) business days to review the appeals request. All parties shall be provided with the original proposal, initial ranking scores and appeal letter. A meeting will be held either in person or through telephone conference call method to discuss and review the appeal request.
 - The Greater Lowell WDB Executive Director shall then notify the proposer of the outcome of the appeal process within three (3) business days of the appeal meeting. If the proposer is still in disagreement with the appeal outcome, they may write to the Department of Career Services at 19 Staniford Street, Boston, MA 02114 to officially request an appeal of the MHGLWB.
- F.** Following the competitive procurement process, all proposals become public record.

The contract awarded to each vendor selected through this procurement will include terms and conditions required to ensure compliance with WIOA statute and regulations. The terms be subject to periodic changes and/or revisions as deemed necessary by MHGLWB staff and/or the City of Lowell Law Department.

Contract Terms

Successful bidders will be awarded a cost reimbursement contract, which will consist of the following sections:

Programmatic Performance Standards	Compliance with WIOA
Scope of Services	Political & Lobbying Activities
Time of Performance	Sectarian Activity
Reporting	Conflict of Interest
Compensation & Method of Payment	WIOA Non-Discrimination & EEO Regulations
Use of Funds	Grievance Procedure Policy
Costs	Disputes
Accounting/Documentation of Costs	Ownership of Materials & Equipment
Program Monitoring/Corrective Action	Copyrights, Patents
Withholding of Compensation/Penalties	Rental & Leasing
Termination of Agreement	Assign ability
Severability of Provisions	Subcontracts
Changes	Insurance & Bonding
Audits	Indemnification
Records	Assurances & Certifications
Disclosure of Confidential Information	Purchase Order Requirement
Maintenance of Effort	Budget & Cost Control Statement

III. Program Specifications

Program Design

WIOA places an emphasis on the development of Career Pathways designed to transition youth from education to the workforce. Career Pathways are an integrated collection of programs and services intended to develop a youth's core academic, technical, and employability skills, provide them with continuous education, training, and placement into high-demand jobs.

The term "Career Pathway" means a combination of rigorous and high-quality education, training, and other services that:

- Align with the skill needs of industries in the economy of the state or regional economy involved;
- Prepare individuals to be successful in any of a full range of secondary or postsecondary education options, including apprenticeships;
- Include counseling to support an individual in achieving education and career goals;
- Include, as appropriate, education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster;
- Organize education, training, and other services to meet the needs of an individual in a manner that accelerates their educational and career advancement to the extent practicable;
- Enable an individual to attain a secondary school diploma or its recognized equivalent, and at least 1 recognized postsecondary credential; and
- Help an individual enter or advance within a specific occupation or occupational cluster.

As WIOA emphasizes Career Pathways, the MHGLWB is also prioritizing the development of regionally focused Career Pathways for all job seekers (regardless of age/education level). The priority industries are advanced manufacturing, professional/technical, healthcare, and social services, construction/trades, and education. For the purposes of this RFP, preference will be given to applicants who develop innovative Career Pathway focused program designs using the 14 WIOA elements described on pages 11/12.

Additionally, WIOA aims to maximize opportunities for competitive, integrated employment for individuals with disabilities. Pre-employment transition services must be made available to youth with disabilities who need such services. Pre-employment transition services for youth include job exploration, work-based learning experiences, workplace readiness training, counseling on opportunities for enrollment in comprehensive transition or postsecondary education programs and instruction in self-advocacy. All applicants must include components in their program design to develop Career Pathways.

WIOA ELEMENTS

The Workforce Innovation and Opportunity Act (WIOA Sec. 123) lists **14 program elements** that must be made available to eligible youth to support the attainment of a secondary school diploma or its recognized equivalent, entry into postsecondary education, occupational skills training, employment, and career readiness for participants. Applicants are encouraged to but are not required to provide all 14 elements on-site, however, all elements must be available locally, if a youth is assessed and requires those services.

The MHGLWB requires that WIOA Title I Vendor's **provide all the mandatory (M) elements (6) highlighted below, and at least four (4) additional elements in your program design.**

1. Tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential; **(M)**
2. Alternative secondary school services, or dropout recovery services, as appropriate
3. Paid and unpaid **work experiences*** that have as a component academic and occupational education **(M)**
4. Occupational skills training, which shall include priority consideration for training programs that lead to recognized postsecondary credentials that are aligned with in-demand industry sectors or occupation in the local area involved
5. Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling and referral, as appropriate
6. Leadership development opportunities, which may include community service and peer-centered activities encouraging responsibility and other positive social and civic behaviors, as appropriate
7. Supportive services - examples may include: Linkages to community services; Assistance with transportation; Assistance with childcare and dependent care; Assistance with housing; Referrals to medical services; and Assistance with uniforms or other appropriate work attire and work-related tools. Provision of additional services that will support youth with disabilities
8. Adult mentoring for the period of participation and a subsequent period, for a total of 12 months
9. Follow-up services for 12 months after the completion of participation, as appropriate; **(M)**
10. Financial Literacy Education **(M)**
11. Entrepreneurial Skills Training
12. Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; **(M)**
13. Activities that help youth prepare for and transition to postsecondary education and training **(M)**
14. Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.

***Paid and Unpaid Work Experiences**

Work Experience/Internship Parameters: WIOA section 129(c)(4) prioritizes work experiences with the requirement that local areas must spend a **minimum of 20 percent** of non-administrative local area funds on work experience. ***Under WIOA, subsidized structured work experiences or internships are limited to a maximum of 100 hours at an hourly rate equal to Massachusetts designated hourly minimum wage.*** Wages to youth in subsidized work experiences will be paid through the MassHire Lowell Career Center/City of Lowell, the fiscal agent of the MHGLWB. Youth Work Experience can include the following paid/unpaid activities:

- Work site placements available throughout the program cycle (Worksites should provide quality and safe working and learning opportunities)
- Employability skills or job readiness training to prepare youth for a work experience/permanent job placement
- Job Shadows
- Pre-apprenticeship programs
- Internships
- On-the-job training opportunities
- Career panels/guest speakers/company tours

Program Components and Sequence of Service

Programs funded through this RFP are required to document the sequence of services consistent with the WIOA system to guarantee all participants receive comprehensive and individualized services in adherence with the Workforce Innovation and Opportunity Act. In order to operate an efficient WIOA program, it is important that the roles and responsibilities of both the MHGLWB and the vendor are clearly defined.

Sequence of Services

- **Outreach and Recruitment:** The MHGLWB will include information about WIOA funded programs on our website and in literature promoting services available to eligible youth. However, vendors should be prepared to bear the primary responsibility for ensuring that their outreach and recruitment efforts result in meeting the enrollment goals established in their contract. Recruitment efforts should be completed during the first six (6) months of the contract period: July 1, 2024 through December 31, 2024. Vendors will be able to concentrate their efforts on WIOA outcomes from January 1, 2025 through June 30, 2025. Significant progress towards meeting the negotiated enrollment goal is required by December 31, 2024. Enrollments must be completed by April 30, 2025.
- **Referrals:** The highly suggested period for referrals will be from July 1, 2024 to December 31, 2024. Vendors will accept referrals made to them by the MHGLWB and other local agencies serving youth.
- **Initial Assessment:** An initial assessment is conducted on the first visit and is considered the “Application Orientation”. The applicant will receive the application and an explanation of the documentation required to determine WIOA eligibility. Also, information on services and programs are provided to the applicant.

- **Point of Entry/Eligibility Determination:** *Eligibility determination is the sole responsibility of the MHGLWB.* As such the point of entry into the WIOA system should be the MHGLWB. This includes the completion of a WIOA application, and the verification of the information provided by the applicant. The collection of required documents is the responsibility of the applicant and vendor. All documents must be submitted to MHGLWB staff and a paper file is maintained. No youth is permitted to receive WIOA services until vendors are notified in writing by the MHGLWB of youth's eligibility.
- **Comprehensive/Objective Assessment:** During this meeting, the application is reviewed along with the documentation to determine WIOA eligibility. An overview of their educational background, employment history, and barrier(s) to employment are discussed and assessment testing is scheduled. The information is then entered into MOSES, the Massachusetts One Stop Employment System Database. A determination of what WIOA or non-WIOA services are most appropriate for the youth is also completed.
- **Assessment Testing:** - Out-of-school youth are **required** to take reading and math assessments using TABE 11/12 (Test of Adult Basic Education). MHGLWB staff will perform TABE Testing at the MHGLWB office weekly. ***Vendors Must be TABE certified to perform testing and Must provide copy of tests to MHGLWB.***
- **Program Enrollment and Commencement of Services:** Education, skills, and career readiness services, on-site, are offered during a designated daily schedule to all enrolled participants including but not limited to: assessments, labor market research, financial literacy, paid and unpaid work experiences, HiSET/GED preparation, occupational skills training, career pathway development and career readiness activities.
- **Development of an Individualized Service Strategy (ISS)** - An ISS will be developed for each youth participant outlining their objective assessment results employment, educational and social-personal goals, appropriate achievement objectives and the combination of needed services based on the WIOA 14 Required Elements. WIOA places a strong emphasis on Career Pathways, therefore, a connection to a career pathway must be included as part of a youth's Individual Service Strategy. The ISS is initiated and maintained by the WIOA program vendor and the MHGLWB. The development of service strategies and goals within the ISS should be directly linked to WIOA performance indicators. **(see Attachment C)**
- **Counseling:** This includes education and career and, if requested, personal counseling.
- **Case Management:** Strategic case management will be necessary in order to connect youth to multiple programs and services, as well as to help youth achieve short-term attainable goals and support youth in long-term positive outcomes. Program (vendor) Case Managers must create and maintain positive relationships with youth. Case management is a tandem effort between the vendor and MHGLWB staff, to ensure goals of the ISS are achieved and positive outcomes are attained for common measures.
- **Monthly Reporting:** Reports must be submitted to the MHGLWB during the first week of each month. Details on credential attainment, progress toward goals, activities completed, and detailed case management must be communicated to assigned MHGLWB staff through the monthly report.
- **Retention after Exit and Follow-up Activities:** Follow-up services are required under WIOA funding. Vendors will provide follow up services which are intended to enhance youth outcomes. All WIOA youth participants who have been placed in employment, or entered the military, post-secondary education/advanced training will receive follow-up services for a minimum of 12 months after exit.

MHGLWB WIOA Specific and Administrative Roles

- **Provide official WIOA eligibility determination** of all targeted youth; *(see Attachment B for a listing of required eligibility documentation)*
- **Maintain hard copy files of each enrolled participant with required documentation**
- **Information Systems MOSES:** MHGLWB maintains an electronic record of an individual, including enrollment information, services received, and case management notes provided by the vendor once they have been determined eligible to participate in the program and is receiving services under WIOA.
- **Coordinate a schedule with each approved youth vendor:** MHGLWB Youth Staff will visit the program on a regular basis to provide any requested programmatic assistance, observe the program and meet with staff as needed
- **WIOA Youth Monthly Reporting:** MHGLWB staff will send monthly reports out to all youth vendors by the 8th of each month. Reports include all enrollees currently participating as well as in follow-up. Reports will include enrollment and exit dates for all participant as well as outcomes and credentials.
- **Conduct oversight and evaluation of program activities of funded youth service providers**
MHGLWB staff will communicate regularly with WIOA funded vendors to ensure programs are offering services listed in proposal and are meeting benchmarks and goals
- **Technical Assistance:** MHGLWB staff are available to assist Vendors in any matter relating to the administration of their WIOA program.
- **Vendor Meetings:** Vendors are required to attend meetings with the MHGLWB staff. The purpose of these meetings is to sustain clear communication between the vendor and the MHGLWB. Meetings may be held on site or at the MHGLWB offices.
- **Program Monitoring:** Each vendor is formally monitored at least once during the contract year by the MHGLWB staff. Regular programmatic reviews are done based on MOSES reports and vendor reports as well as invoices submitted on a monthly basis.

Program Performance Measures/Indicators

Bidders responding to this RFP must meet Performance Measures; Applicants must consider strategies for meeting the WIOA Performance Indicators:

MEASURABLE OUTCOME (exited participants)	Outcome Description
Placement in Employment/Education/Military 2 nd Quarter After Exit	% of all exited youth participants who are in in post-secondary education or training or employed during 2nd Quarter after exit.
Placement in Employment/Education/Military 4 th Quarter After Exit	% of all exited youth participants who are in post-secondary education or training or employed during 4th Quarter after exit
Median Earnings 2 nd Quarter after exit	Median wages for exited participants who are employed during the 2 nd quarter after exit
Credential Attainment (up to 1 year after exit)	% of youth who obtain a post-secondary credential, license, or industry recognized credential during program or within 1 year of exit OR % of youth who obtain diploma/equivalency AND have obtained or retained a job OR are in an education or training program that leads to a license or industry recognized credential within 1 year of exit
Measurable Skills Gain	% of youth in an education or training program that leads to a credential or employment and who are achieving “measurable skills gains” Meeting one or more “Measurable skill gains” include: 1.) Attainment of a high school diploma 2.) Achievement of an educational function level 3.) Transcript / Report Card achievement 4.) Achievement of a milestone (completion of OJT, apprenticeship program, any training achievement) 5.) Achievement of a trade-related benchmark /skill progression (knowledge-based exams)
Effectiveness in Serving Employers	% of youth employed with the same employer in the 2nd and 4th quarters after exit.

Program Performance Goals (based on FY24 WIOA Performance Measures*)

MEASURABLE OUTCOME (exited participants)	Goal*
Placement in Employment/Education/Military 2 nd Quarter After Exit	75%
Placement in Employment/Education/Military 4 th Quarter After Exit	72%
Median Earnings 2 nd Quarter after exit	\$3,600
Credential Attainment (up to 1 year after exit)	65%
Measurable Skills Gain	45%
Effectiveness in Serving Employers	TBD

IV. Proposal Provisions & Requirements

RFP Timeline

Date	Activity
March 25, 2024	Request for Proposals Released
April 4, 2024	Bidder's Conference Webinar @ 10:00 AM
April 16, 2024	Deadline for Submission of Written Questions
May 7, 2024	Proposals Due by 11:00am
June 2024	Bidders Notified of Outcome after Board Approval
July 1, 2024	Contract State Date

Submission Requirements

The MHGLWB reserves the right to declare proposals received after the 11:00AM, May 7th, 2024 deadline to be considered non-responsive and may be rejected for consideration. Deadline will be strictly enforced.

- **In accordance with the City of Lowell procurement guidelines, Program and Price proposals must be reviewed and evaluated separately. Program Proposals and Price Proposals must be submitted in separate sealed packaging.**
- **Program and Price proposals must have their own cover sheet.**
- **The original of each proposal must contain the signature of your agency signatory.**

The delivery of proposals is the sole responsibility of the bidder. It is the sole responsibility of the bidder to ensure that proposals are received at the proper location, prior to the stated deadline. The transmission of proposals by fax is not permitted. Bidders will be provided with a receipt of submission upon request.

All proposals must conform to the following format requirements:

- To be considered for funding, **one (1) clearly marked, unbound original** and **eight (8) bound (staples, paper clip, etc.) copies** of the **Program Proposal** must be received at the **MHGLWB offices at 107 Merrimack Street (3rdFloor) Lowell, MA 01852**, no later than **11:00 a.m.** on May 7th, 2024. **Please note: The Price Proposal requires one (1) clearly marked, unbound original and two (2) bound (staples, paper clip, etc.) copies to be delivered on the same date and time.**
- Send **one copy of your full proposal package electronically** to Cathleen Sturtevant at Cathleen.sturtevant@masshiregreaterlowell.com
- **The Program Narrative can be no longer than 12 pages and no smaller than 11 size font.**
- Please check your proposal for internal consistency. The checklist for the Program Proposal and Price proposal should be used as a guide to accomplish this and must be included as part of your proposal.
- Cover sheets for both the program and price proposal must be signed by the Authorized Signatory of the lead Agency, as documented by the submitted Authorized Signatory form.
- Failure to follow the RFP format could result in disqualification of your proposal.

Proposal Review

A. Program Proposal

Program proposals will be reviewed and rated by a sub-committee of Board members who have no vested interest or benefit from the funding decisions of the MHGLWB. The program proposal narrative has five (5) parts. Proposals will be rated according to a point system. The maximum total any proposal may receive is 100 points. Each part is awarded points as follows:

Program Design	40 points
Customer Identification (Outreach and Recruitment)	25 points
Past Performance (incumbent Vendors)/Ability to achieve WIOA Youth Program Outcomes	25 points
Administration	5 points
Program Operations	5 points

Complete proposals received by the submission deadline and that meet all requirements, will be reviewed by the Proposal Review Subcommittee. The Committee shall utilize the evaluation criteria noted in the Program Proposal section and identified in the MHGLWB WIOA Youth Proposal Rating Criteria. Proposals will be given an overall rating of Highly Advantageous, Advantageous, Not Advantageous, or Unacceptable based on the points awarded. The overall scoring and overall rating breaks down as follows:

90 to 100 points	Highly Advantageous
75 to 89 points	Advantageous
50 to 74 points	Not Advantageous
Less than 50 points	Unacceptable

Proposals with an overall rating of Highly Advantageous or Advantageous will be considered for funding. Proposals receiving a rating of Not Advantageous or Unacceptable will not be considered.

B. Price Proposal

MassHire Greater Lowell Workforce Board staff will first review all proposals to determine if the minimum qualifying criteria has been met (Pg. 44). Proposals that do not meet the Minimum Qualifying Criteria will not be considered for funding. If minimum-qualifying criteria have been met, proposals will then be reviewed for program costs. Proposed costs will be compared with similar costs proposed by other bidders, as well as historical data available (i.e. current or previously funded contracts). Results will be documented.

C. Final Funding

Final funding decisions will take into consideration the results of the program and price proposal reviews, an adequate mix of the various types of services to be made available and an equitable distribution of funds and services to youth throughout the region. The MHGLWB reserves the right to reject any and all proposals, to not fund any or all proposals, and/or to partially fund any and all proposals as submitted in response to this RFP. All proposals become the property of the MHGLWB/City of Lowell.

V. Attachments List

- A. Map of Region
- B. WIOA Participant Eligibility Documentation Chart
- C. ISS – Individual Service Strategy
- D. WIOA 14 Elements

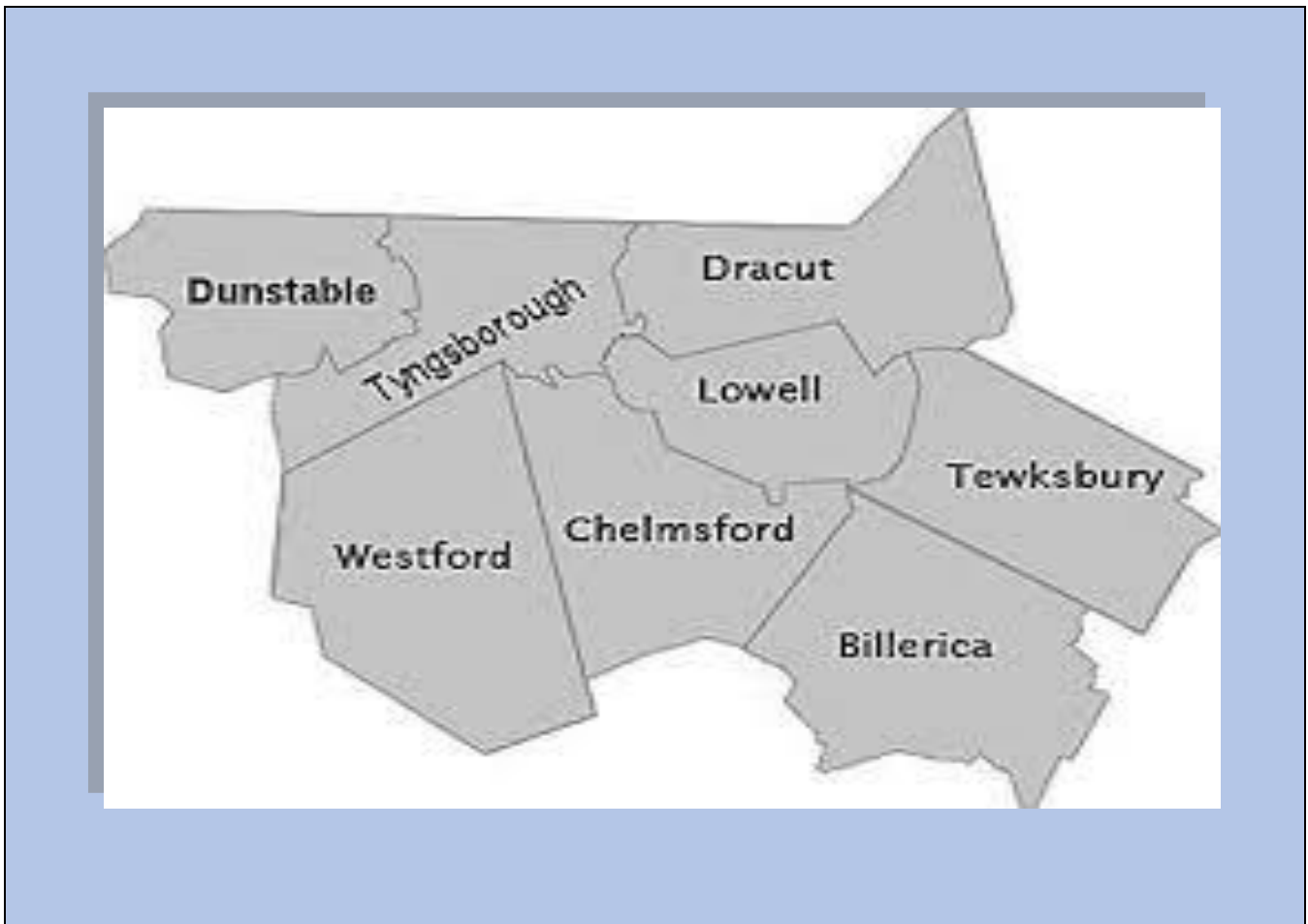
Program Proposal

- E. Contents Checklist (Program Proposal)
- F. Program Proposal Cover Sheet OSY
- G. Program Proposal Cover Sheet ISY
- H. MHGLWB WIOA Youth Proposal Rating Criteria and Narrative Questions

Price Proposal

- H. Contents Checklist (Price Proposal)
- I. Price Proposal Cover Sheet
- J. Minimum Qualifying Criteria
- K. Signatory Authorization for Corporate Providers/ Affidavit of Compliance
- L. Signatory Authorization for Non-Corporate Providers
- M. Certification Regarding Debarment, Suspension, and other Responsibility Matters Primary Covered Transactions
- N. Drug Free Workplace Certification
- O. Certificate of Non-Collusion
- P. Audit Certification
- Q. Commitment to Equal Opportunity/Affirmative Action/Non-Discrimination
- R. Budget & Budget Narrative Instructions
- S. Youth Program RFP Budget Worksheet
 - Tab 1: Youth Program Budget
 - Tab 2: Youth Work Experience Budget with Youth Wages and/or Staffing (20% total budget)
 - Tab 3: Total Budget Summary
- T. Youth Program Budget Narrative
- U. Work Experience Budget Narrative

Greater Lowell Workforce Area



**WIOA TITLE I YOUTH
ELIGIBILITY SOURCE DOCUMENTATION**

ELIGIBILITY CRITERIA	SOURCES OF DOCUMENTATION (Only one of the following is required for each criterion. See also alternate forms.) This document listing may not be exhaustive. Should you encounter a document that is not listed here, please contact your MDCS Field Management and Oversight representative for assistance in discerning the document’s validity for the purpose of WIOA Title I eligibility.
YOUTH ELIGIBILITY REQUIREMENTS	
In-School Youth	1. School Records/Identification Card 2. Letter from School Official 3. Report Card/ Transcript
Out-of-School Youth	1. Copy of HS Diploma/ HiSET/ GED 2. Verification of Enrollment in High School Equivalency Program (not funded by the public K-12 school system) 3. Verification of Enrollment in Dropout Re-Engagement Program 4. Verification of Enrollment in the YouthBuild Program 5. Verification of Enrollment in the Job Corps Program 6. Verification of Enrollment in Adult Education Programs funded by Title II 7. Certificate of Attainment (Received by students that do not pass the grade 10 MCAS and satisfactory complete all other school requirements.)
Birth Date/Age	1. Baptismal Record 2. Birth Certificate 3. DD-214, Report of Transfer or Discharge Paper 4. Driver’s License (with Photo and Date of Birth) 5. Federal, State or Local Government Identification Card that includes a birth date 6. Selective Service Card 7. Hospital Record of Birth 8. Passport (as long as the passport includes the date of birth) 9. Public Assistance\Social Service Records 10. School Records\Identification Card 11. Letter from Commonwealth of Massachusetts EOHHS Agency (for Foster Child and State Custody Youth, only) 12. Unexpired Alien Registration Card/Documents indicating authorization to work in the Unites States I-179, I-197, I-551, I-688, I-688A, I-688B, I-766, Certificate of Naturalization (Form N-550 or N-570), I-94 Arrival/Departure Form

<p>U.S. Citizenship <i>or</i> Authorization to Work in the United States if a non-U.S. Citizen</p>	<ol style="list-style-type: none"> 1. U.S. Baptismal Certificate (if place of birth is shown) 2. U.S. Birth Certificate 3. U.S. Hospital Record of Birth 4. U.S. Passport (either current or expired) 5. U.S. Passport Card (either current or expired) 6. Non-Restricted Social Security Card AND Government Issued Identification containing a photograph or information such as name, date of birth, gender, height, eye color, and address. 7. Certificate of Naturalization (Form N-550 or N-570) 8. Unexpired Alien Registration Card/Documents indicating authorization to work in the United States (INS Forms I-179, I-197, I-327, I-551, I-571, I-688, I-688A, I-688B, I-766, an unexpired I-94 Arrival/Departure form that includes an endorsement (stamped) of the individual's status as authorized to work in the United States when accompanied with an unexpired temporary foreign passport that has the same name as the I-94, an unexpired temporary foreign passport stamped with an I-155 Work Authorization stamp 9. Native American Tribal Document 10. Printout from the Systematic Alien Verification for Entitlements Program (SAVE) AND a Government Issued Identification containing a photograph or information such as name, date of birth, gender, height, eye color, and address.
<p>Selective Service Registrant*</p>	<ol style="list-style-type: none"> 1. DD-214, Report of Transfer or Discharge 2. Selective Service Online Verification at http://www.sss.gov (printout) 3. Selective Service Registration Acknowledgement Card 4. Selective Service Status Information Letter 5. Selective Service Registration Record (Form 3A) 6. Stamped Post Office Receipt of Registration 7. Certificate of Naturalization (Form N-565 or N-570; indicates compliance with all Selective Service requirements) 8. U.S. Passport (for non-U.S. born customers, only)

YOUTH ECONOMIC ELIGIBILITY

ELIGIBILITY CRITERIA	ACCEPTABLE DOCUMENTATION
<p>Individual/Family Income (Individual/Family Income must be documented within 6 months prior to enrollment)</p>	<ol style="list-style-type: none"> 1. Alimony Agreement 2. Award letter from Veterans Administration 3. Bank Statements (Direct Deposits) 4. Compensation Award Letter 5. Court Award Letter 6. Employer Statement/Contact 7. Business Financial Records 8. Housing Authority Verification 9. Pay Stubs 10. Pension Statement 11. Quarterly Estimated Tax for Self-Employed Persons 12. Social Security Benefits 13. Unemployment Insurance Documents 14. Written statement from other Federal, State or Local agency 15. Applicant Statement if no other forms of documentation are available – must be supported with a corroborative contact or reliable witness (see Attachment C instruction – mass.gov – alternative forms) 16. Telephone verification if other forms of documentation are not readily available (see Attachment C instruction) mass.gov – alternative forms 17. Document Inspection if provided document cannot be legally photocopied (see Attachment C instruction) mass.gov – alternative forms
<p>Individual Status/Family Size</p>	<ol style="list-style-type: none"> 1. Birth Certificate 2. Decree of Court 3. Disabled (See “Individuals with Disabilities” below) 4. Divorce Decree 5. Lease or Landlord Statement 6. Marriage Certificate 7. Medical Card 8. Public Assistance/Social Service/Public Housing Agency Records 9. Applicant Statement if no other forms of documentation are available – must be supported with a corroborative contact or reliable witness (see Attachment C instruction) 10. Telephone verification if other forms of documentation are not readily available (see Attachment C instruction) 11. Document Inspection if provided document cannot be legally photocopied (see Attachment C instruction)

Income–Based Public Assistance	<ol style="list-style-type: none"> 1. Copy of Authorization to Receive Cash Public Assistance 2. Medical Card showing Cash Grant Status 3. Public Assistance Identification Card showing Cash Grant Status 4. Public Assistance Records/Printout/Master File 5. Verification of Enrollment in MassHealth 6. Verification of Fuel Assistance
Supplemental Nutrition Assistance Program (SNAP)	<ol style="list-style-type: none"> 1. Current authorization to obtain SNAP 2. SNAP Card with current date 3. Public Assistance Records/Printout
Free or Reduced School Lunch	<ol style="list-style-type: none"> 1. Verification from School
High Poverty Area	<ol style="list-style-type: none"> 1. Poverty Threshold Census Tract Database Print Out
Homeless (Income verification not required)	<ol style="list-style-type: none"> 1. Written Statement from an Individual Providing Temporary Residence 2. Written Statement from Shelter/Social Service Agency 3. McKinney Vento Homeless Act Authorization Form 4. Applicant Statement if no other forms of documentation are available – must be supported with a corroborative contact or reliable witness (see Attachment C instruction) 5. Telephone verification if other forms of documentation are not readily available (see Attachment C instruction) 6. Document Inspection if provided document cannot be legally photocopied (see Attachment C instruction)
Foster Child – Department of Children and Family Services (Income verification not required)	<ol style="list-style-type: none"> 1. Documentation of Court Contact 2. Court Documentation 3. Medical Card 4. Verification of Payments made on Behalf of the Child 5. Written Statement from State\Local Agency 6. Telephone verification if other forms of documentation are not readily available (see Attachment C instruction) 7. Document Inspection if provided document cannot be legally photocopied (see Attachment C instruction)
YOUTH BARRIERS for ELIGIBILITY	
ELIGIBILITY BARRIERS	ACCEPTABLE DOCUMENTATION (Only one of the following is required for each criterion)
Basic Skills Deficient	<ol style="list-style-type: none"> 1. Assessed by a Generally Accepted Standardized Test 2. School Records

School Dropout	<ol style="list-style-type: none"> 1. Attendance Letter from school 2. Dropout Letter from school 3. Eligibility Verification Letter from a recognized community or youth organization (if other documents are not available) 4. Applicant Statement if no other forms of documentation are available – must be supported with a corroborative contact or reliable witness (see Attachment C instruction) 5. Telephone verification if other forms of documentation are not readily available (see Attachment C instruction) 6. Document Inspection if provided document cannot be legally photocopied (see Attachment C instruction)
Within Compulsory School Age and has Not Attended School in the Most Recent Complete School Year Calendar Quarter	<p>*Compulsory school age in Massachusetts is 6-16 years of age.</p> <ol style="list-style-type: none"> 1. Attendance letter from school 2. Letter from school official stating youth school status 3. Applicant Statement if no other forms of documentation are available – must be supported with a corroborative contact or reliable witness (see Attachment C instruction) 4. Telephone verification if other forms of documentation are not readily available (see Attachment C instruction) 5. Document Inspection if provided document cannot be legally photocopied (see Attachment C instruction)
Recipient of Secondary School Diploma or its Recognized Equivalent who is Low-Income and Basic Skills Deficient or an English Language Learner	<ol style="list-style-type: none"> 1. Copy of Secondary School Diploma or equivalent and provide proof of either; <ol style="list-style-type: none"> a. Basic Skills Deficiency or b. English Language Learner
Department of Youth Services/Subject to the Juvenile or Adult Justice System (In-School Youth's Own Income Must be Considered)	<ol style="list-style-type: none"> 1. Documentation of Court Contact 2. Court Documentation 3. Verification of Payments made on Behalf of the Child 4. Written Statement from State\Local Agency 5. Agency Telephone verification if other forms of documentation are not readily available (see Attachment C instruction) 6. Document Inspection if provided document cannot be legally photocopied (see Attachment C instruction)
Homeless or Run-away	See "Homeless" in Economic Eligibility above
Foster Child	See "Foster Child" in Economic Eligibility above

<p>Pregnant or Parenting</p>	<ol style="list-style-type: none"> 1. Birth Certificate 2. Hospital Record of Birth 3. Medical Card 4. Physician's Note 5. Referrals from Official Agencies 6. School Program for Pregnant Teens 7. School Records 8. Statement from Social Services Agency 9. Applicant Statement if no other forms of documentation are available – must be supported with a corroborative contact or reliable witness (see Attachment C instruction) 10. Telephone verification if other forms of documentation are not readily available (see Attachment C instruction) 11. Document Inspection if provided document cannot be legally photocopied (see Attachment C instruction)
<p>Individual with Disabilities (In-School Youth's Own Income Must be Considered)</p>	<ol style="list-style-type: none"> 1. Letter from Drug or Alcohol Rehabilitation Agency 2. Letter from Child Study Team Stating Specific Eligibility 3. Medical Records 4. Observable Condition 5. Physician Statement 6. Psychiatrist's/Psychologist's Diagnosis 7. Rehabilitation Evaluation 8. School Records 9. Sheltered Workshop Certification 10. Social Service Records\Referral 11. Social Security Administration Disability or Veterans Admin. Records 12. Vocational Rehabilitation Letter 13. Workers Compensation Record 14. Applicant Statement if no other forms of documentation are available – must be supported with a corroborative contact or reliable witness (see Attachment C instruction) 15. Telephone verification if other forms of documentation are not readily available (see Attachment C instruction) 16. Document Inspection if provided document cannot be legally photocopied (see Attachment C instruction)

Offender (In-School Youth's Own Income Must be Considered)	<ol style="list-style-type: none"> 1. Court Documents 2. Halfway House Resident 3. Letter of Parole 4. Letter from Probation Officer 5. Police Records 6. Applicant Statement if no other forms of documentation are available – must be supported with a corroborative contact or reliable witness (see Attachment C instruction) 7. Telephone verification if other forms of documentation are not readily available (see Attachment C instruction) 8. Document Inspection if provided document cannot be legally photocopied (see Attachment C instruction)
Low-Income Individual who Requires Additional Assistance	1. Proof of low-income status and meets the local definition of Requires Additional Assistance.
English Language Learner	<ol style="list-style-type: none"> 1. Letter from school official 2. Statement from recognized community youth organization. 3. School Assessment

5% Exception – for youth who do not meet the minimum income criteria.

Not more than 5% of “Covered Individuals” in each local area may be individuals who do not meet the income criteria.

Covered Individuals	<ol style="list-style-type: none"> 1. In-School Youth who is not low-income. 2. Out-of-School Youth who meet one of the following conditions: <ul style="list-style-type: none"> • Recipient of a secondary school diploma or its recognized equivalent who is basic skills deficient or an English language learner who is not low-income. • Individual who requires additional assistance to enter or complete an educational program or to secure or hold employment who is • not low- income.
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Attachment C

**Youth Individual Service Strategy (ISS)
for WIOA Youth Services**

TEMPLATE

Youth Name:	_____	Date:	_____
DOB:	_____	ID#:	_____
Address:	_____	Phone:	_____
Email:	_____	Staff:	_____

*Do not use social security number for participant I.D.

Framework of an ISS:

- ▶ Directly linked to one or more indicators of performance
- ▶ Based on the objective assessment
- ▶ Identifies a career pathway that includes education and employment goals

Brief Assessment Overview		
<i>Identify personal, educational, occupational, financial, medical, childcare, transportation, housing, food/nutrition</i>		
Assessment Area	Assessment Tool Used Including Dates	Description of Results
Academic Levels		
Basic Skills		
Service Needs		
Interests and Aptitudes		
Work Experience		

Strengths	Challenges (Barriers)	Service/Resource/Partner Agency Referral

Goals

Identify personal, educational, and occupational short- and long-term goals

Goal Type	Short-Term Goal	Long-Term Goal	Performance Indicator(s) Goal is Linked To
Educational Goal			
Occupational/Employment Goal			
Personal/Social Goal			

Program Elements Needed to Achieve Goal

Youth are required to have access to all fourteen WIOA Youth program elements. Please select elements based on needs identified on the participant's objective assessment.

Improving Educational Achievement	Date Opened	Projected End Date	Actual End Date	Successful Completion
<input type="checkbox"/> Tutoring: study skills training, and instruction leading to secondary school completion, including dropout prevention strategies <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>
<input type="checkbox"/> Alternative secondary school offerings <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>
<input type="checkbox"/> Activities that help youth prepare for transition to postsecondary education and training <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>
Preparing for and Succeeding in Employment	Date Opened	Projected End Date	Actual End Date	Successful Completion
<input type="checkbox"/> Paid & unpaid work experience (summer employment, pre-apprenticeship programs, internships, job shadowing, OJT) with Academic & occupational education <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>

<input type="checkbox"/> Labor market & employment information including career awareness, career counseling, and career exploration services <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>
<input type="checkbox"/> Education offered concurrently with workforce preparation and training for a specific occupation <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>
Supporting Youth	Date Opened	Projected End Date	Actual End Date	Successful Completion
<input type="checkbox"/> Supportive services <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>
<input type="checkbox"/> Adult mentoring <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>
<input type="checkbox"/> Comprehensive guidance & counseling (may include drug & alcohol abuse counseling & referral) <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>
<input type="checkbox"/> Follow-up <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>

Developing the Potential of Young People as Citizens & Leaders	Date Opened	Projected End Date	Actual End Date	Successful Completion
<input type="checkbox"/> Leadership development opportunities/ Opportunities to develop social behaviors, other soft skills, and leadership opportunities <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>
<input type="checkbox"/> Financial literacy <i>Action Steps/Referrals:</i> <i>Comments:</i>				<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Explain:</i>

Potential Barriers to Goal Achievement:

Case Notes/ISS Review Updates:
Include any progress, such as but not limited to measurable skill gains, other goal completions

Individual Service Strategy Updates		
Date	Case Note Update	Youth and Case Manager Initials

ISS for WIOA Youth Services - Youth and Case Manager Agreement Form

Youth Name: _____	Date: _____
DOB: _____	ID*: _____

Youth and Case Manager Agreements:

For Youth - I agree to:

- ▶ Contact my Case Manager monthly or as often as necessary to update my progress on this plan. I understand that my case can be closed if I go 90 days without participating in a service.
- ▶ Let my Case Manager know of any problems which would cause changes to any activities or interfere with completing the plan.
- ▶ Seek, accept, and maintain employment that meets my planned goal(s) as stated above.
- ▶ Contact my Case Manager when I become employed and provide all necessary information pertaining to the job.
- ▶ Stay in contact with my Case Manager for up to a year after exiting the program to maintain and support meeting my goals.

For the Case Manager – I agree to:

- ▶ Assist with the appropriate career guidance, training, and supportive services.
- ▶ Coordinate with other agencies and programs to help you obtain needed services.
- ▶ Monitor your participation and progress in the activities above.
- ▶ Assist you in your search for employment.
- ▶ Maintain contact with you for up to one year after you obtain employment for employment retention and career advancement purposes.

Youth Signature

Case Manager Signature

Date of 1st Review

Date of 1st Review

Youth Signature

Case Manager Signature

Date of 2nd Review

Date of 2nd Review

Attachment D

REQUIRED 14 ELEMENTS (Definitions/Examples below)

1. Tutoring, Study Skills and Dropout Prevention Strategies – *Mandatory (M)*

Tutoring: Actual instruction; individualized instruction; drop-in sessions; **Study Skills:** Time management training; test taking strategies; note taking; **Dropout Prevention Strategies:** Family engagement; individualized services

2. Paid and Unpaid Work Experience With academic and occupational education components – *(M)*

- Paid Work Site placements available throughout the program cycle
- Employability skills or job readiness training to prepare youth for a work experience/placement
- Pre-apprenticeship programs
- Internships and job shadowing
- On-the-job training opportunities
- Career panels/guest speakers/Company tours

3. Financial Literacy Education Financial literacy workshops provided by business representatives at worksites or community agencies; work readiness workshops that include financial literacy lessons *(M)*

4. Services that provide Labor Market Information (LMI) about in-demand industry sectors and occupations – (M) - Career exploration services; Labor market research; online LMI sites (i.e.: *Massachusetts Career Information Systems*)

5. Activities that help youth prepare for and transition to postsecondary education and training - (M) College/Training Program visits & fairs; Financial Aid assistance; program applications; dual enrollment

6. Follow-up Services - Provided by vendor, supported by MHGLWB as necessary, for 12 months- *(M)*

Regular contact with a youth participant's employer, including assistance in addressing work-related problems that arise; regular contact with youth; assistance in securing better paying jobs; career development

7. Alternative Secondary School - Enrolled in HiSET/GED classes; Alternative secondary school services

8. Occupational Skills Training leading to attainment of recognized credentials for in-demand occupations -

Short term skills training for a specific occupation that lead to the attainment of a certificate and that provide training for skills necessary to enter or advance in a specific occupation, apprenticeship programs

9. Comprehensive guidance and counseling – Drug/alcohol/mental health counseling; in-depth career counseling

10. Leadership Development - Community volunteering and service-learning projects; peer mentoring; tutoring

11. Supportive Services - Linkages to community services; Assistance with transportation, child/dependent care; housing; Referrals to medical services; assistance with uniforms/work attire/ work-related tools

12. Adult Mentoring - Participation in programs such as Big Brothers Big Sisters; Virtual adult mentoring via e-mail or other electronic communication; structured programs that provide training and support to mentors

13. Entrepreneurial Skills Training -Entrepreneurial workshops, sessions and programs offered by a community agency

14. Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster - School-based & postsecondary Career Pathway programs with integrated career awareness, exploration, and immersion activities; Vocational Programs; Partnered business-education training

PROGRAM PROPOSAL

FY 2025 WIOA Title I Year-Round Youth Services Program Proposal

Program Proposal Contents Checklist

ISY ____ OSY ____

Place a check mark to indicate that each area has been addressed. Write N/A if not applicable.

Cover Sheet

_____ Each section fully completed

_____ Signed by authorized signatory

Proposal Narrative

_____ Program Design

_____ Outreach & Recruitment

_____ Program Outcomes

_____ Program Planning Summary completed

_____ Administration

_____ Program Operation

Attachment F

**MassHire Greater Lowell Workforce Board
 Division of City Manager’s Office
 WIOA Title I Year-Round Youth Services
 Programs - FY 2025**

Program Proposal Cover Sheet

ISY _____ OSY _____

Organization: _____

Mailing Address: _____

Contact Person: _____

Telephone: _____

Email Address: _____

City/Towns
 to Be Served: _____

Project Performance Goals: (must complete – fill in all yellow)

1. Total Participants (7/1/2024-6/30/2025) – includes carry-in from FY24 and new enrollees (1A+1B)	
1A. Carry-in Participants (originally enrolled prior to 6/30/24 and will still be actively participating in WIOA funded program activities after 6/30/2024) * New Vendors – Carry-in = “0”	
1B. New Enrollees (enrolled after 7/1/2024)	
2. Total Participants attaining a Credential (HiSET or GED/Industry Recognized Credential/occupational skills license or PSE Degree	
3. Total Participants Entering employment/PSE/Advanced Training/Military at exit	
4. Total Participants in employment/PSE/Advanced Training/Military 2nd quarter after	
5. Total Participants in employment/PSE/Advanced Training/Military 4th quarter after exit	
6. Instructor: Participants Ratio	

Signature of Authorized Representative for Your Organization:

Submitted By: _____
 Signature Date

Attachment G-1

MHGLWB WIOA Out-of School Youth Program Proposal Narrative Questions

A. Program Design (40 points)

1. Summarize the design of your program. Clearly list your organization's projected enrollment goals and outcome goals.
2. Describe when the school year program services will take place (i.e. days, evenings)
3. Describe the activities to take place during the summer component of the program.
4. Describe the timeline for program implementation, indicating when all phases of the program will begin and end (include 12-month follow-up).
5. Describe the credentials the participants in your program will be working toward achieving and what activities they will take part in to reach that goal (attain a HiSET/GED and/or an industry recognized credential)
6. Explain how your program design develops career pathways for each participant.
7. Describe career and self-assessments to be utilized, labor market research techniques, and modes of exposure to targeted industries
8. Describe your case management strategies.
9. Describe the characteristics of the out-of-school youth population you propose to serve (examples: age, youth with disabilities, school drop-out, pregnant/parenting teens, DYS or DCF involved foster child, youth aging out of foster care, juvenile offenders, etc.). Explain why/how this cohort was identified.
10. Describe your experience working with WIOA Out-of-School youth or a similar population.
11. Describe the components of your program design that meet the needs of individuals with disabilities.
12. Describe any partnerships/collaborations you have established for the proposed program. What are the roles and responsibilities of each?

13. **Utilizing the descriptions of the 14 required Elements on Attachment D (pg. 32)** describe your plan for ensuring all 14 WIOA Elements are available locally. Describe in detail how your program will provide the six **(6) mandatory *elements and at least four (4 minimum) of the other 8 elements**. Include your process for referring youth to other service providers who offer WIOA service elements locally that you are not providing **(4 maximum)**.

** Please ensure that your plan for offering **Work Experiences to all participants** (including paid and unpaid) include activities during the school/program year and the summer (refer to pages 11/12)*

B. Outreach and Recruitment (25 points)

1. Please provide a timeline of your organization's plan to recruit youth to meet proposed enrollment goals to participate in this program.
2. Describe your organization's outreach strategy to meet WIOA performance measures/outcomes.
3. Describe your intake and assessment process for newly recruited youth and how enrollment into programming is determined after this process.
4. **Current vendors** - If your organization failed to meet enrollment goals through March 31, 2023, please provide a description of new strategies your organization may take to ensure success in FY 24.

For new applicants - Explain a situation in the past when your organization has failed to meet enrollment or other goals and the strategies undertaken to resolve the issue (if applicable).

5. Describe any referral agreements you will enter into with other organizations to refer target group members to your program.

C. Program Outcomes (25 points)

1. Provide a description of how a youth will progress from point of entry to exit achieving the WIOA performance outcomes as a goal.
2. **FOR FY22 VENDORS(CURRENT) ONLY:**
 - a. Describe past/current performance in achieving WIOA performance measures or similar program measures. Define results. For example, total number of youth enrolled, total number of HiSET or diplomas received, total number entered into and retention at 2nd and 4th quarter after exit: employment, post-secondary education, military, and advanced training
 - b. Describe your organization's strategy for how each participant will meet program performance goals* as defined for Out-of-School youth. **(see performance indicators on pg. 15)**
 - c. Clearly list your organization's enrollment goals and actual results through March 31, 2024.

- d. Clearly list your organization’s outcome goals and actual results through the same period.
- e. If your agency did not achieve outcome performance goals during FY 24, explain why and discuss strategies that will be undertaken to successfully meet goals in FY 25.
- f. Describe follow-up activities include in this how monthly contact will be performed and what actions will be taken to help youth re-enter the workforce if they have lost their employment or if they left or never started post-secondary education, advanced training, or military service.

3. FOR NEW VENDORS/PROGRAMS IN FY24:

- a. Describe the past three years of programming resulting in performance outcomes like the requested performance measures in this RFP. Define results. For example, total number of youth enrolled, total number of Hi-SET attainments, diplomas, total number of entered employment, entry into post-secondary, military, and advanced training, etc. (If your organization has no prior experience working with this population, please be clear in explaining how your program design is built using an evidenced-based program model(s))
- b. Clearly list your organization’s projected enrollment goals if awarded funding*
- c. Describe your organization’s strategy for meeting performance outcomes outlined in this RFP. Describe how program activities and services will result in outcomes that are appropriate for Out-of-School youth. (*see descriptions of performance indicators on page 15*)

* Please note: Tentative FY’24 Goals

Attainment of Hi-SET/Industry Recognized Credential:	70.5%
Entered Employment/Education/Military 2 nd Qtr.:	81%
Entered Employment/Education/Military 4 th Qtr.:	74%

- d. Please provide an example of a time when your organization did not achieve contract performance goals and discuss the strategies undertaken to successfully meet the goals in the following year (if applicable).
- e. Describe follow-up activities include in this how monthly contact will be performed and what actions will be taken to help youth re-enter the workforce if they have lost their employment or if they left or never started post-secondary education, advanced training, or military service.

D. Administration (5 points)

1. Provide an overview and mission statement of the organization.
2. Describe staffing of program as it relates to this program.
3. Provide a job description for each position to be funded by this proposal. Include resumes of existing staff or job descriptions of staff to be hired.

E. Program Operations (5 points)

Facilities providing services should be in full compliance of American with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act of 1974 as well as other applicable Federal and State laws.

1. Describe the facilities to be used for activities and services. Include location.

Attachment G-2

MHGLWB WIOA In- School Youth Program Proposal Narrative Questions

A. Program Design (40 points)

1. Summarize the design of your program. Clearly list your organization's projected enrollment goals and outcome goals.
2. Describe when the school year program services will take place (i.e. days, evenings, after-school, length of time, days per week)
3. Describe the activities to take place during the summer component of the program.
4. Describe the timeline for program implementation, indicating when all phases of the program will begin and end (include 12-month follow-up).
5. Describe how your program will be working with participants to obtain a high school diploma and if offered, an industry recognized credential. Identify what activities they will take part in to reach these goals.
6. Explain how your program design develops career pathways for each participant.
7. Describe career and self-assessments to be utilized, labor market research techniques, and modes of exposure to targeted industries
8. Describe your case management strategies.
9. Identify the characteristics of the in-school youth population you propose to serve (examples: age, youth with disabilities, pregnant/parenting teens, DYS or DCF involved foster child, youth aging out of foster care, juvenile offenders, etc.). Explain why/how this cohort was identified.
10. Describe your experience working with WIOA In-School youth or a similar population.
11. Describe the components of your program design that meet the needs of individuals with disabilities.
12. Describe any partnerships/collaborations you have established for the proposed program. What are the roles and responsibilities of each?
13. **Utilizing the descriptions of the 14 required Elements on Attachment D (pg. 32) describe your plan for ensuring all 14 WIOA Elements are available locally. Describe in detail how your program will provide the six (6) *mandatory* *elements and at least four (4 minimum) of the other 8 elements. Include your process for referring youth to other service providers who offer WIOA service elements locally that you are not providing (4 maximum).**

** Please ensure that your plan for offering **Work Experiences to all participants** (including paid and unpaid) include activities during the school/program year and the summer (refer to pages 11/12)*

B. Outreach and Recruitment (25 points)

1. Please provide a timeline of your organization's plan to recruit youth to meet proposed enrollment goals to participate in this program.
2. Describe your organization's outreach strategy to meet WIOA performance measures/outcomes.
3. Describe your intake and assessment process for newly recruited youth and how enrollment into programming is determined after this process.
4. **Current vendors** - If your organization failed to meet enrollment goals through March 31, 2023, please provide a description of new strategies your organization may take to ensure success in FY 25.

For new applicants - Explain a situation in the past when your organization has failed to meet enrollment or other goals and the strategies undertaken to resolve the issue (if applicable).

5. Describe any referral agreements you will enter into with other organizations to refer target group members to your program.

C. Program Outcomes (25 points)

1. Provide a description of how a youth will progress from point of entry to exit achieving the WIOA performance outcomes as a goal.
2. **FOR FY22 VENDORS(CURRENT) ONLY:**
 - a. Describe past/current performance in achieving WIOA performance measures or similar program measures. Define results. For example, total number of youth enrolled, total number diplomas or credentials received, total number entered into and retention at 2nd and 4th quarter after exit: employment, post-secondary education, military, and advanced training
 - b. Describe your organization's strategy for how each participant will meet program performance goals* as defined for In-School youth. **(see descriptions of performance indicators on page 15)**
 - c. Clearly list your organization's enrollment goals and actual results through March 31, 2024.
 - d. Clearly list your organization's outcome goals and actual results through the same period.
 - e. If your agency did not achieve contract performance goals during FY 24, explain why and discuss strategies that will be undertaken to successfully meet goals in FY 25.
 - f. Describe follow-up activities include in this how monthly contact will be performed and what actions will be taken to help youth re-enter the workforce if they have lost their employment or if they left or never started post-secondary education, advanced training, or military service.

3. FOR NEW VENDORS/PROGRAMS IN FY25:

- a. Describe the past three years of programming resulting in performance outcomes similar to the requested performance measures in this RFP. Define results. For example, total number of youth enrolled, total number of diplomas or credentials, total number of entered employment, entry into post-secondary, military, and advanced training, etc. (If your organization has no prior experience working with this population, please be clear in explaining how your program design is built using an evidenced-based program model(s))
- b. Clearly list your organization’s projected enrollment goals if awarded funding*
- c. Describe your organization’s strategy for how each participant will meet program performance goals* as defined for In-School youth. *(see descriptions of performance indicators on page 15).*

* Please note: Tentative FY’25 Performance Goals

Attainment of Hi-SET/Industry Recognized Credential:	71%
Entered Employment/Education/Military 2 nd Qtr.:	81%
Entered Employment/Education/Military 4 th Qtr.:	74%

- d. Please provide an example of a time when your organization did not achieve contract performance goals and discuss the strategies undertaken to successfully meet the goals in the following year (if applicable).
- e. Describe follow-up activities include in this how monthly contact will be performed and what actions will be taken to help youth re-enter the workforce if they have lost their employment or if they left or never started post-secondary education, advanced training, or military service.

D. Administration (5 points)

- 1. Provide an overview and mission statement of the organization.
- 14. Describe staffing of program as it relates to this program.
- 15. Provide a job description for each position to be funded by this proposal. Include resumes of existing staff or job descriptions of staff to be hired.

E. Program Operations (5 points)

Facilities providing services should be in full compliance of American with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act of 1974 as well as other applicable Federal and State laws.

- 1. Describe the facilities to be used for activities and services. Include locations.

PRICE PROPOSAL

FY 2025 WIOA Title I Youth Price Proposal

ISY _____ OSY _____

Price Proposal Contents Checklist

Place a check mark to indicate that each area has been addressed. Write N/A if not applicable.

Cover Sheet

_____ Each section fully completed

_____ Signed by authorized signatory

Minimum Qualifying Criteria

_____ Signatory Authorization for Corporate Providers (If Applicable)

_____ Signatory Authorization for Non-Corporate Providers (If Applicable)

_____ Certification Regarding Debarment, Suspension and Other Responsibility Matters

_____ Statement of Commitment to a Drug-Free Workplace

_____ Certificate of Non-Collusion

_____ Audit Assurance Certification

_____ Evidence of Commitment to Equal Opportunity, Nondiscrimination, and Affirmative Action

Budget & Budget Narrative

_____ Budget Completed

_____ Budget Narrative Completed

_____ Indirect Rate included (if applicable)

Attachment I

**MassHire Greater Lowell Workforce Board/Division of City Manager’s Office
WIOA Title I Year-Round Youth Services**

ISY _____ OSY _____

Price Proposal Cover Sheet

Organization: _____

Mailing Address: _____

Fiscal Contact: _____

Telephone: _____

Email: _____

City/Towns
To Be Served: _____

Total Amount of Funding Request:

Project Performance Goals: (must complete all cells in yellow)

1. Total Participants (7/1/2024-6/30/2025) – includes carry-in from FY24 and new enrollees (1A+1B)	
1A. Carry-in Participants (originally enrolled prior to 6/30/24 and will still be actively participating in WIOA funded program activities after 6/30/2024) * New Vendors – Carry-in = “0”	
1B. New Enrollees (enrolled after 7/1/2024)	
2. Total Participants attaining a Credential (HiSET or GED/Industry Recognized Credential/occupational skills license or PSE Degree	
3. Total Participants Entering employment/PSE/Advanced Training/Military at exit	
4. Total Participants in employment/PSE/Advanced Training/Military 2nd quarter after exit	
5. Total Participants in employment/PSE/Advanced Training/Military 4th quarter after exit	
6. Instructor: Participants Ratio	

Signature of Authorized Representative for Your Organization:

Submitted By: _____
Signature Date

Attachment J

Minimum Qualifying Criteria

In order to be considered for funding, the following must be completed and submitted with your original price proposal only (it is not necessary to submit these with the copies). Failure to complete these certifications and affidavits could result in your proposal not being considered for funding.

- Signatory Authorization for Corporate Providers (If Applicable)
- Signatory Authorization for Non-Corporate Providers (If Applicable)
- Certification Regarding Debarment, Suspension and Other Responsibility Matters
- Statement of Commitment to a Drug-Free Workplace
- Certificate of Non-Collusion
- Audit Assurance Certification
- Evidence of Commitment to Equal Opportunity, Nondiscrimination, and
- Affirmative Action

Attachment L

Signatory Authorization for Non-Corporate Providers

Name of entity: _____

Address: _____

Designate type of entity (e.g., sole proprietorship, partnership, local education agency, municipality, etc.):

Title of the staff position with authority to sign contracts: _____

Name of the person currently filling this position: _____

Signature of authorized party _____ Date: _____

Attachment M

Certification Regarding Debarment, Suspension and Other Responsibility Matters Primary Covered Transactions

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part 98, Section 98.510, Participants' responsibilities. The regulations were published as Part VII of the May 26, 1988 Federal Register [Pages 19160-19211].

BEFORE SIGNING THE CERTIFICATION, PLEASE READ THE INSTRUCTIONS WHICH ARE AN INTEGRAL PART OF THE CERTIFICATION

1. The prospective primary participant certifies to the best of its knowledge and belief that it and its principals:
 - a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;
 - b. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public [Federal, State or local] transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of record, making false statements, or receiving stolen property;
 - c. Are not presently indicted for or otherwise criminally or civilly charged by a government entity [Federal, State, or local] with the commission of any of the offenses enumerated in paragraph [1] [b] of this certification; and
 - d. Have not within a three-year period preceding this application/ proposal had one or more public transactions (Federal, State, or local) terminated for cause or default.
2. Where the prospective primary participant is unable to certify any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

NAME AND TITLE OF AUTHORIZED SIGNATORY

SIGNATURE

DATE

Attachment N

Drug Free Workplace Certification

I, _____, in representation of
(Print Name)

_____, do hereby certify that
(Agency/Organization)

_____, has taken all
(Agency/Organization)

Necessary measures to ensure a drug free workplace consistent with the **Drug Free Workplace Act of 1988**, as well as all applicable state laws.

Signature

Date

Attachment O

Certificate of Non-Collusion

The undersigned certifies under penalties of perjury that this bid, or proposal has been made or submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

(Printed name of individual submitting bid or proposal)

(Signature of individual submitting bid or proposal)

(Name of Organization)

(Date)

Attachment P

Audit Certification

Check whichever is applicable.

_____ A copy of my organization's most recent Audited Financial Statements or Single Audit (if applicable) is attached.

_____ A copy of my organization's most recent Audited Financial Statements or Single Audit (if applicable) has already been submitted to MHGLWB Staff.

_____ As an entity of the Commonwealth of Massachusetts, a copy of my organization's most recent Single Audit is available online at _____
(Indicate website)

(Printed name of individual submitting bid or proposal)

(Signature of individual submitting bid or proposal)

(Name of Organization)

(Date)

Attachment Q

Commitment to Equal Employment Opportunity/Affirmative Action/Non-Discrimination

I have attached my organization's Equal Opportunity/Affirmative Action/Non-Discrimination Policy.

(Printed name of individual submitting bid or proposal)

(Signature of individual submitting bid or proposal)

(Name of Organization)

(Date)

Attachment R

Budget Instructions

There are three worksheets to this budget (**Attachment S**). They are as follows:

- Program Budget
- Work Experience Budget
- Proposal Budget Summary

The instructions listed below apply to both the Program and the Work Experience Component. You will not be making any entries in the Proposal Budget **Summary** worksheet. That worksheet is locked. It is there to calculate your total proposal, as well to calculate that at least the minimum required percentage of your total proposal is going to the Work Experience component (**minimum of 20% of total proposal must go to the Work Experience component**).

IMPORTANT - There are formulas in the budget templates. These formulas are set up to calculate each section of the budget, as well as the grand total. These formulas also perform important calculations on the Program Summary page. Manipulating these formulas will cause the budget spreadsheet to not calculate properly. **Please do not alter the formulas.**

Make entries only in cells shaded yellow

It is strongly recommended that the person completing this budget document understands Microsoft Excel. If not, please engage the assistance of someone who does.

Salaries – List each position that will be charged to the Program component and Work Experience Program on each separate budget. Include the hourly rate for each position.

In the column marked ***Current Weekly Hours Worked at Youth Vendor***, please list the total hours that person/position normally works. Under the ***Weekly Hours Charged*** column, please list the total hours to be charged to the Program or Work Experience component; ***if a staff person is to be charged to both components, hours should be broken down by how many hours will be dedicated to each component.***

The existing spreadsheet has space for 5 positions. If necessary, you may insert additional rows. Please be sure to copy the formulas in the total column if you insert additional rows.

Fringe Benefits – List each component of your fringe benefits package that you are proposing. There are some listed in the budget (FICA, Medicare, Retirement, Medical). If they are not applicable to your situation you may replace them with what is applicable. ***You must include the percentage of total salaries for each component.***

Other Costs – List all other costs you are proposing. There are already costs listed. You are not limited to these, nor are you required to propose a cost for each one. If there are categories listed that are not applicable and you need the space, you may overwrite what is there with what is applicable to your situation. ***Please be aware that in the “Other” section we have included Participant Wages and Participant Fringe in the Work Experience component - see “Work Experience Specific Instructions” on the following page.***

Indirect/Admin – List your Indirect and/or Administration cost. ***It must not exceed 5% of the total program budget.***

Work Experience Budget Specifics:

A minimum of 20 percent of non-administrative funds must be used to provide In-School and Out-Of-School Youth with work experiences. The 20% expenditure requirement includes wages and staffing costs for the development and management of work experiences. **Allowable work experience expenditures include:**

- Wages/stipends paid to youth in the work experience
- Incentive payments directly tied to the completion of work experience
- Employability skill/job readiness training to prepare youth for work experience
- Staff time working to identify and develop a work experience opportunity, including staff time spent work with employers to identify and develop the work experience
- Staff time working with employers to ensure a successful work experience, including staff time spent managing the work experience
- Staff time spent evaluating the work experience
- Participant work experience orientation sessions
- Classroom training or the required academic component directly related to the work experience
- Orientations for employers

The 20%work expenditure can also be spent on job placement assistance activities leading to the obtainment of job placement and identification of possible employment opportunities.

Participant Wages and Participant Fringe in the Work Experience component are to be recorded in the "Other" section of the Work Experience Budget.

Narratives

A separate budget narrative must be completed for each component. **(Attachments T,U)**

Attachment S – BUDGET (3 TABS in Budget) in excel

Attachment T - Program Budget Narrative

Provide a narrative justification of the following costs in the space provided as directed. Attach additional space if necessary.

Program Staff Positions/Salaries: – Explain the function of each position. Justify the number of hours charged per week for each position as well as the total weeks charged for each position.

Fringe Benefits – Explain your fringe package.

Other Costs - Fully explain and justify each proposed “Other” cost in the space provided. Describe why each is necessary to the proposed program.

Include the basis for calculating each cost. Examples for calculating costs may include but not necessarily limited to:

- Premises – total square feet x cost per square foot
- Supplies – historical date, cost per staff
- Travel – total estimated miles x rate per mile

Indirect/Admin Costs – Provide an explanation of your Indirect/Admin costs. Please indicate if you have a federally approved indirect cost rate.

Attachment U - Work Experience Budget Narrative

Provide a narrative justification of the following costs in the space provided as directed. Attach additional space if necessary.

Work Experience Staff Position/Salaries – Explain the function of each position. Justify both the number of hours charged per week for each position as well as the total weeks charged for each position.

Participant Wages – Explain hourly rate, average total hours, and number of participants

Fringe Benefits – Explain your fringe package.

Other Costs - Fully explain and justify each proposed “Other” cost in the space provided. Describe why each is necessary to the proposed program.

Include the basis for calculating each cost. Examples for calculating costs may include but not necessarily limited to:

- Premises – total square feet x cost per square foot
- Supplies – historical date, cost per staff
- Travel – total estimated miles x rate per mile