

# GLWDB

## GREATER LOWELL

### Workforce Development Board

Aligning workforce development, business, education and community resources  
to create sector strategies and career pathways

## REQUEST FOR PROPOSAL 17-24 FOR ONE-STOP OPERATOR SERVICES

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July 1, 2017 to June 30, 2021

**ISSUE DATE:** October 10, 2016

**PROPOSALS DUE:** November 15, 2016

**CONTACT:**

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Chief Procurement Officer  
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Lowell, MA 01852  
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# INTRODUCTION AND RFP PURPOSE

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The Greater Lowell Workforce Development Board Workforce Board (hereinafter referred to as GLWDB) is issuing this RFP for the purpose of selecting an organization with the appropriate capacity and expertise to design, administer and implement an innovative and compliant system of one-stop workforce development services for the benefit of the job seeker and business customers in the Greater Lowell Workforce Development Region. These services must, at a minimum, include Workforce Innovation and Opportunity (WIOA) and related shared partner services and be delivered in an integrated model.

A copy of the WIOA regulations is available at <HTTPS://www.doleta.gov/WIOA/>.

Notice of this competitive solicitation will be published in The Lowell Sun, serving the Greater Lowell Workforce Development Region and through City of Lowell distribution channels. The RFP will be published on the City of Lowell website [www.lowellma.gov/Purchasing/Pages/General/OpenSolicitations.aspx](http://www.lowellma.gov/Purchasing/Pages/General/OpenSolicitations.aspx)

## **DUE DATE:**

Sealed proposals are due on: **November 15, 2016** and will not be publically opened, at City Hall in the Purchasing Department, Room 60, 375 Merrimack Street, Lowell, MA 01852, at **4:00 PM**, EST/EDST, for the work described herein. **BIDDERS ARE REQUIRED TO SUBMIT A BID INCLUDING ALL BID FORMS CONTAINED IN THIS PACKAGE. DO NOT REMOVE PAGES.** Eligible bidders must submit one (1) original and seven (7) copies of the entire proposal, along with one (1) electronic version (in .pdf).

## **BIDDERS CONFERENCE:**

A prebid is scheduled for: **October 20, 2016** at City Hall in the Mayor's Reception Room, 2<sup>nd</sup> floor, 375 Merrimack Street, Lowell, MA 01852, at **10:00 AM**

## Request for Proposals (RFP) Schedule (needs to be updated)

- |                     |  |
|---------------------|--|
| • October 10, 2016  | RFPs released; Public Notice reissued      |
| • October 20, 2016  | Bidders' Conference                        |
| • October 28, 2016  | Written question deadline                  |
| • November 4, 2016  | Responses issued to written questions      |
| • November 15, 2016 | Proposals due                              |
| • November 17, 2016 | Proposals distributed to GLWDB review team |
| • November 22, 2016 | Evaluation Committee meets                 |
| • November 29, 2016 | Possible Interviews                        |
| • December 8, 2016  | Written recommendations completed          |
| • July 1, 2017      | New Contracts in Place                     |

# Contents

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I.	Background.....	5
A.	Resources .....	5
B.	Purpose of Request for Proposals and Contract Period.....	6
C.	Eligible Bidders .....	6
D.	Submission of Proposals.....	7
E.	Additional Information for Bidders .....	8
F.	Availability of Funds .....	9
G.	Payment Process as it Relates to Service Delivery and Performance Standards.....	10
H.	Subcontracting .....	11
I.	Interview Rights to Jobs Created.....	11
J.	Selection Process.....	11
K.	Minimum Standards .....	11
L.	GLWDB and Bidder’s Rights/Appeal Procedures .....	12
II.	Evaluation & Selection .....	15
III.	References.....	15
IV.	Program Proposal - Instructions & Narrative.....	23
A.	Format Requirements .....	23
B.	Proposal Narrative Requirements.....	23
1.	<b>Bidder Eligibility</b> .....	24
2.	<b>Organizational Capacity and Alignment</b> .....	24
3.	<b>Program Elements / Implementation Plan</b> .....	26
4.	<b>Program Outcomes and Deliverables</b> .....	31
5.	<b>Fiscal Accountability</b> .....	32
V.	Price Proposal.....	33
A.	Price Proposal Contents Checklist.....	33
B.	Minimum Qualifying Criteria.....	35
C.	Budget .....	36
D.	Budget Narrative: WIOA One-Stop Operator.....	40
	Appendix 1: Cover Sheets .....	41
	Appendix 2: Minimum Qualifying Criteria .....	43

<b>1. Signatory Authorization for Corporate Providers</b> .....	43
<b>2. Signatory Authorization for Non-Corporate Providers</b> .....	44
<b>3. Certification Regarding Debarment, Suspension and Other Responsibility Matters</b> .....	45
<b>4. Certificate of Non-Collusion</b> .....	46
<b>5. Commitment to Equal Employment Opportunity/Affirmative Action/Non-Discrimination</b> .....	47
<b>6. Certification of Lobbying Activities</b> .....	48
Appendix 3: Statement of Assurances .....	49
Attachment A: Available Career Center Funds Per FY17 Budget .....	50
Attachment B: One Stop Standards .....	51
Attachment C: Citrix/MOSES Fees .....	56

## I. Background

In July 2014, the Workforce Innovation and Opportunity Act (WIOA) was signed into law. WIOA 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. Congress passed the Act by a wide bipartisan majority; it is the first legislative reform in 15 years of the public workforce system. WIOA supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973.

One of sixteen Local Workforce Regions in the state of Massachusetts, the Greater Lowell Workforce Development Region includes the City of Lowell, and the Towns of Billerica, Chelmsford, Dracut, Dunstable, Tewksbury, Tyngsborough, and Westford. The Lowell City Manager serves as the Chief Elected Official (CEO) and has been granted WIOA designation by the Governor of Massachusetts. The CEO has appointed the Greater Lowell Workforce Development Board (GLWDB) to function as the Local Workforce Board (WDB) for the region. Incorporated as a 501(c)(3), the GLWDB's mission is to promote and develop a workforce system that is responsive to the needs of business and job seekers resulting in increased economic prosperity in the region and the Commonwealth. The GLWDB provides Board staffing and, pursuant to WIOA, has been authorized by the Massachusetts Department of Career Services to conduct and manage the procurement of One-Stop Operator services for the Greater Lowell Workforce Development Region.

### A. Resources

The GLWDB develops a Local Annual Plan that contains a performance plan, as well as labor market information about the area. Since the information is readily available to bidders, it will not be repeated in this RFP. See links below for more information:

- GLWDB FY17 Annual Plan Executive Summary:  
<http://glwdb.org/wp-content/uploads/2015/11/FY-17-Annual-Plan-Exec-Sum.pdf>
- GLWDB 2015-17 Strategic Plan may be accessed directly at:  
<http://glwdb.org/wp-content/uploads/2015/11/glwibstratplan2015-16.pdf>
- The Commonwealth of Massachusetts WIOA and one-stop policies may be found at:  
<http://www.mass.gov/massworkforce/>
- Workforce Innovation and Opportunity Act and regulations may be found on the U.S. Department of Labor web page at: <https://www.doleta.gov/WIOA/>
- Further information on building relationships and partnerships for co-located and off site partners can be found through Social Policy Research Associates:  
[https://www.doleta.gov/usworkforce/onestop/pdf/pract/CH2\\_MAST.PDF](https://www.doleta.gov/usworkforce/onestop/pdf/pract/CH2_MAST.PDF)

- Information on current and historic performance for the GLWDB/Career Center of Lowell as well as other Massachusetts WIBs and Career Centers can be found at:

<http://www.mass.gov/massworkforce/issuances/wioa-information/09-performance/>

## B. Purpose of Request for Proposals and Contract Period

The purpose of this RFP is to solicit proposals from qualified entities for a WIOA One-Stop Operator for the Greater Lowell Workforce Board Region. The proposal which, in the opinion of the awarding body, best provides for operating a One-Stop delivery system in conjunction with the GLWDB Strategic plan and serving the Greater Lowell Workforce Development Region will be invited to enter into contract negotiations. Resulting contracts will be negotiated with respect to cost, scope, and content in a manner that achieves the establishment of this System in the best interest of the Greater Lowell Workforce Development Region.

The successful bidder's program will be required to serve all persons requesting assistance, including low-income individuals, veterans, and individuals requiring academic and occupational education and training to become gainfully employed. The successful bidder will also be required to serve all businesses requesting assistance to meet their employment needs. The initial contract will run from July 1, 2017 through June 30, 2018 and may be extended for three additional one-year periods.

## C. Eligible Bidders

Eligible entities include [Section 121(d)(2)(B)]:

An entity (public, private, or nonprofit), or consortium of entities (including a consortium of entities that, at a minimum, includes 3 or more of the one-stop partners described in subsection (b)(1), of demonstrated effectiveness, located in the Greater Lowell Workforce Development Region, which may include:

- An institution of higher education;
- A State employment service agency established under the Wagner-Peyser Act on behalf of the local office of the agency;
- A community-based organization, nonprofit organization, or intermediary;
- A private-for-profit entity
- A government agency; and
- Another interested organization or entity, which may include a local chamber of commerce or other business organization, or a labor organization.

**\*EXCEPTION:** Elementary schools and secondary schools are not eligible for designation or certification as one-stop operators, except nontraditional public secondary schools and area career and technical education schools.

The agreement between the GLWDB/City of Lowell and the One-Stop Operator will specify the operator's role. That role may include coordinating service providers within the Center, as well as being the primary provider for services within the Greater Lowell Workforce Development Region. Any bidder with whom the Local

Workforce Board (WDB) executes a contract for the provision of the services described in this Request for Proposals will be a sub recipient pursuant to applicable federal laws and regulations and shall be required to comply with 2 CFR Part 200, as well as the Workforce Innovation and Opportunity Act and all other applicable federal and state laws and regulations.

At this time the GLWDB has established one level of certification for its One-Stop Career Center Operator including the following requirements:

**COMPREHENSIVE ONE-STOP CAREER CENTER (to be designated as an American Job Center):** requires that all available mandated partners be physically co-located and/or, providing their core services on a part-time or full-time basis, in-person or electronically. The Comprehensive site must have a fully equipped resource area. A completed Memorandum of Understanding (MOU) will be signed and include all partners at the American Job Center. The Greater Lowell Workforce Development Board staff will negotiate the mandated unified partner MOU.

## D. Submission of Proposals

All proposals must be received in a sealed package by 4:00 p.m. EST on November 15, 2016. Proposals received after this date and time will be considered non-responsive and will be rejected entirely for consideration. The 4:00 pm deadline will be strictly enforced.

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 or email is not permitted. Bidders will be provided with a receipt of submission upon request.

All proposals must conform to the following format requirements:

- Proposers must submit one original (so marked, with original signatures) proposal, seven (7) paper copies (for a total of eight response packages) and one (1) electronic copy (in .pdf format on a USB drive) to:

**Designated Point of Contact**

P. Michael Vaughn  
Chief Procurement Officer  
Purchasing Department, City of Lowell  
City Hall, 375 Merrimack Street, Room 60, Lowell, MA 01852  
Phone: 978.970-4110  
Email: [PMVaughn@lowellma.gov](mailto:PMVaughn@lowellma.gov)

- Proposals must be marked on the outer packaging with information identifying the sender and the statement: "Sealed Proposal: WIOA One-Stop Operator"
- Proposals may be mailed via regular mail, express delivery or hand-delivered. Because this is a sealed proposal, faxed or emailed proposals will not be accepted or opened.

- 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 price and program proposal envelopes must state the proposers name and mailing address, and RFP 17-24 One Stop Operator Services
  - 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.

The Greater Lowell Workforce Board is not liable for any costs incurred by organizations prior to awarding the contract. The copy marked “Original” will take precedence over any other copies, should there be a discrepancy. Container(s) utilized for original documents must be clearly marked **ORIGINAL DOCUMENTS**. Please note that the address label must appear as specified on the face of each container.

Data contained in the proposal and all documentation provided therein, become the property of the Greater Lowell Workforce Board. The data and documentation contained therein will not become public information until a contract is approved and signed.

Proposals will be evaluated by members of a Review Committee of the GLWDB. This committee will consist of Greater Lowell Workforce Board members and staff as well as core partners with the appropriate expertise to conduct such proposal evaluations. Names of the members of the Review Committee will become public information.

Prior to award, bidders are advised that only the designated point of contact can clarify issues or render any opinion regarding this Request for Proposals. No individual member of the Greater Lowell Workforce Board, staff, or member of the Review Committee is empowered to make binding statements regarding this RFP.

## **E. Additional Information for Bidders**

The Greater Lowell Workforce Development Board is an Equal Opportunity Employer and encourages competition at all levels. Any interested and qualified Proposer meeting the eligibility requirements of this solicitation is encouraged to submit a bid.

Prospective Bidders should inform the Greater Lowell Workforce Development Board if the specifications or other proposal requirements are faulty, unnecessary, or inhibit competition. If the Greater Lowell Workforce Development Board agrees with the Bidder, an amendment will be issued.

This Request for Proposals does not commit the Greater Lowell Workforce Development Board to fund any proposals submitted before execution of a contract. The Greater Lowell Workforce Development Board reserves the right to accept or reject any or all proposals received or to negotiate terms of the proposal with a qualified Bidder.

Funding availability is subject to change for subsequent program years; therefore, bidders should be aware that subsequent contract amounts, if any, are subject to change from year to year based upon fluctuations in Federal awards. If funds awarded for a contract year are not fully expended by a contractor by the end of a contract year (June 30), unexpended funds may revert back to the Greater Lowell Workforce Development Board for disposition and may or may not be available for subsequent, if any, contract year expenditures.

#### **A. Bidders' Conference**

A Bidders' Conference will be held October 20, 2016, beginning at 10:00 a.m. at Lowell City Hall, Mayors Reception Room, 375 Merrimack Street, Lowell, MA 01852. Please contact Michael Vaughn (email: [PMVaughn@lowellma.gov](mailto:PMVaughn@lowellma.gov) or phone: 978.970-4110) and indicate your intention to attend.

Attendees are encouraged to submit pertinent questions in writing by November 4, 2016, to Michael Vaughn by email at [PMVaughn@lowellma.gov](mailto:PMVaughn@lowellma.gov). Questions posed at the bidders' conference will be answered to the extent possible and allowable at that time. Any questions not answered as well as any written questions will be answered and provided in written format as an Addenda to all REGISTERED bidders.

If any changes/modifications are made to this RFP, Addenda will be issued. Addenda will be posted on the City of Lowell website [www.lowellma.gov/Purchasing/Pages/General/OpenSolicitations.aspx](http://www.lowellma.gov/Purchasing/Pages/General/OpenSolicitations.aspx)

#### **Availability of Funds**

Federal funding is the primary sub-grant support for the One-Stop Center. For planning purposes, the respondent to this RFP should assume no more than level funding for each program year as noted FY17 Executive Summary Plan on the GLWDB website. PY2017/FY18 amounts are subject to change, based upon the actual amount secured by the GLWDB. All agreements are subject to the availability of funds from the Greater Lowell Workforce Development Region.

Please note that, should a new center operator be chosen, the successful bidder is encouraged to plan access to non-awarded financial resources as the successful bidder may receive a reduced amount in the first year in order that the CEO/GLWDB satisfy any remaining payouts for terminated staff, and/or terminating existing GLWDB budget obligations such as rent/office space, utilities, telephones /communications, information technology support, cleaning, and printing costs, via program, administrative or partner funds. Financial terms will be negotiated with the successful bidder including whether the bidder intends to utilize existing staff, space, equipment, IT and/or other resources, supplies, etc. Please note that the current building lease obligation is transferable.

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

The One Stop Career Center in Lowell is funded through a variety of federal and state resources, some of which are formula driven and others of which are competitively obtained through collaborative proposals among the GLWDB, the One-Stop and various Partners. While it is difficult to predict funding from one year to the next, Attachment A summarizes FY2017 resources available to the current Career Center Operator. Please note that, while impossible to predict, in general, federal formula resources are expected to decline in Massachusetts and in Greater Lowell due to declining unemployment rates. Despite the declining rates, demand for career centers services remain stable as our business customers are hiring and our job seekers require training at a more intense level.

In addition to WIOA funding, the successful bidder is expected to manage and implement other grants as detailed in **Attachment A**. The successful bidder is also required to utilize the Citrix/MOSES database to tracking data and performance. The Citrix/MOSES system requires additional costs outlined in **Attachment C**. Please note that the GLWDB will manage WIOA Youth funding.

## **F. Payment Process as it Relates to Service Delivery and Performance Standards**

The Board will use a cost-reimbursement contract. The selected contractor will be reimbursed for allowable actual service delivery costs on a monthly basis after submittal and approval of payment vouchers as described in the contract.

The successful bidder will serve all persons requesting assistance, including recipients of public assistance, other low-income individuals, veterans' priority, and individuals who are basic skills-deficient. The successful bidder shall create, collect, and maintain all records relating to One-Stop operations and WIOA service provision activities that are required to be made by applicable federal or state laws or regulations, made relevant by guidance from the U.S. Department of Labor, and/or which are necessary for determining the Greater Lowell Workforce Development Region's attainment of the local levels of performance negotiated with the Governor and Lowell City Manager (Chief Elected Official). Local levels of performance are described in the Greater Lowell Region's Annual Plan and multi-year Strategic Plan, and the successful bidder is required to provide support for WIOA service providers, co-located and non-co-located partners to meet or exceed their goals. The One-Stop Operator will be held responsible for metrics outlined in Section IV.B.4: Program Outcomes and Deliverables. Reimbursement for program costs will be made on a monthly basis providing that these performance standards are being met. Performance Standards will be reviewed on a quarterly basis. For examples of past and current Performance Standards see also Program Outcomes and Deliverables in this RFP.

Any revenues above costs generated by any not-for-profit organization through use of these funds, including interest income or other program generated income, must be reported as program income and reported and utilized for continued operation of the Center.

Bidders may not charge individuals eligible for workforce programs a fee for any basic service; however, if the proposal intends to charge fees for enhanced services to non-eligible individuals and/or businesses, the service and fee structure must be fully described in the narrative.

## G. Subcontracting

The GLWDB acknowledges the need to form viable partnerships that will help to enhance outreach and recruitment efforts to benefit the Greater Lowell Workforce Development Region and/or provide strategies to engage employers, organized labor, and/or education in the One-Stop Delivery System. Proposals utilizing specialized services to deliver such activities may include subcontractors. Any subcontracting must be clearly identified in the proposal narrative and the GLWDB, prior to contract execution must provide approval. If the bidder currently subcontracts certain functions or activities and intends to do so as part of this proposal, the subcontractor must be identified and a certification included from the subcontractor attesting to their agreement to the terms of the proposal and any resulting contract.

## H. Interview Rights to Jobs Created

The successful bidder for WIOA One-Stop Operator must agree to interview and strongly consider for employment, all incumbent program operations staff (current Career Center of Lowell/City of Lowell employees) who apply for employment with the new provider. Incumbent staff will be granted consideration for experience and performance for any position for which they are qualified. In the event of a transition and a reduction of staff, the GLWDB shall carefully oversee the process to ensure that there is no loss of service or reduction of quality.

## I. Selection Process

The proposal criteria provide a guideline for bidders and reviewers; however, the final decision for contract award rests solely with the GLWDB, with the agreement of the Chief Elected Official. The GLWDB will select a bidder that offers the best value as identified in the program and price proposal. The primary consideration in selecting agencies or organizations will be their ability to meet minimum standards.

## J. Minimum Standards

- All copies of the proposal (one (1) original and seven (7) copies, along with one (1) electronic version (in .pdf format via USB flash) must be received by November 15, 2016 via U.S. mail, express mail, or hand delivery.
- Proposals must satisfy the requirements contained in Section II.B. Proposal Narrative Requirements.
- Bidders must satisfy the eligibility requirements contained in Section I.C. Eligible Bidders.
- All signature forms must be completed by the appropriate parties.
- Bidders who intend to engage a subcontractor(s) to provide services must demonstrate, in the form of original certifications from each subcontractor, a willingness to agree to all terms of the proposal and any resulting contract.

Bidders who satisfy these criteria will be selected for primary consideration on the basis of their ability to demonstrate effectiveness in delivering comparable or related services through demonstrated performance, and will take into consideration such matters as whether the agency or organization has:

- The ability to meet the program design specifications at a reasonable cost, as well as the ability to meet performance goals;
- Adequate financial resources or the ability to obtain them;
- A satisfactory record of past performance in operator-related activities;
- The ability to perform in an environment driven by demand;
- The ability to work with community partners and make referrals as needed;
- The ability to provide services that can lead to the achievement of competency standards for participants with identified deficiencies;
- A satisfactory record of integrity, business ethics, and fiscal accountability;
- The necessary organization, experience, accounting, and operation controls; and
- The technical skills to perform the work.

## K. GLWDB and Bidder's Rights/Appeal Procedures

- The release of this RFP does not constitute an acceptance of any offer, nor does its release in any way obligate the GLWDB to execute a contract with any bidder. The GLWDB 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.
- The GLWDB 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 GLWDB.
- The GLWDB 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.
- Any organization making application under this RFP has the right to file an appeal.

A bidder may file an Appeal in compliance with the requirements of MassWorkforce Issuance 100.DCS 01.102 "Procurement and Contracting" Attachment C (D) 5 which mandates that the review and evaluation of a solicitation requires a description of the appeal/protest process. As such and for purposes of the Competitive Selection of the Lead Operator/Service Provider:

- If the Local Board has made determination of award to the dissatisfaction of a bidder, that bidder may appeal/protest to the Local Complaint Officer (CO) within **10 business days** of receipt of notification of non-award (*provide name and address – if a Local Board staff is named as the CO than an alternative non-Board member CO must be named*).
- The Local CO must make a written determination within **20 business days** of receipt of the appeal/protest.

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

**\*NOTE:** For clarity it must be stated that an administrative hearing is not the same as a Court of Law. Technical rules of evidence *do not apply*. It is up to the local CO to follow principles and procedures that are designed to assure credible evidence that can be tested through cross-examination.

- The CO must provide the complainant with a written determination. The CO must include the right to appeal within the written determination. Notification must be given that the complainant may submit a request for a State level appeal and/or hearing and that it must be made in writing **within 20 business days** of the receipt of the local determination.
- The CO for the purposes of this solicitation will be:
 

P. Michael Vaughn  
Chief Procurement Officer  
City of Lowell  
375 Merrimack Street, Room 60  
Lowell, MA 01852  
Email: pmvaughn@lowellma.gov

**STATE LEVEL APPEAL/HEARINGS OF LOCAL DETERMINATION**

- If the local determination to uphold the denial of the award does not resolve the appeal to the satisfaction of the appellant, the appellant may request a state-level appeal and/or formal appeal

hearing in writing within **10 business days** of receiving the denial. The request for appeal and/or formal appeal hearing must be sent to:

Office of Director  
Massachusetts Workforce Development Board  
Charles F. Hurley Building  
19 Staniford Street, 4<sup>th</sup> Floor  
Boston, MA 02114

- If the appellant chooses to request an appeal without specifically requesting an appeal hearing, the State Board, or its designee (Authorized State Official - ASO), may decide to either make a determination based solely on the information included in the case file or conduct further investigation and issue a written determination without scheduling a formal hearing.
- In either case, the State Board/ASO must submit a written determination to the appellant within **30 days** of receipt of the original appeal request or **30 days** after having received additional information from further investigation or **30 days** after a formal hearing **request**.
- If the State Board/ASO has made a written request for information to the appellant or the appellant's authorized representative, and they do not respond within the given time frame the appeal is considered **resolved**.
- If the State Board/ASO deems that a formal hearing is necessary or if the appellant specifically requests such a hearing, the State Board/ASO will notify the parties (in writing) that the matter has been scheduled for a formal hearing. The notice must inform the parties of the following conditions of the hearing process.

#### **Formal Hearing Process**

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

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

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

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

- May decide to make a determination based on the information included in the case file or investigate further prior to the formal hearing.
- May decide to conduct a hearing on more than one appellant if the issues are related.

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

A decision under this state appeal process is final and **may not** be appealed to the U.S. Secretary of Labor.

## II. Evaluation & Selection

### A. Program Proposal

Complete proposals received by the submission deadline and that meet all requirements, will be reviewed by the GLWDB's Proposal Review committee. The committee shall utilize the evaluation criteria noted in the Program Proposal section and identified in the GLWDB WIOA OSCC Comparative Criteria.

Proposals will be given an overall rating of Highly Advantageous, Advantageous, Not Advantageous, or Unacceptable based on the points awarded. The Comparative Criteria Chart can be viewed from pgs 16-22. 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

The GLWDB's Technical Proposal Review committee will first review all proposals to determine if the minimum qualifying criteria have been met. 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 to job seekers and businesses throughout the region. The GLWDB/City of Lowell reserves the right to reject any and all proposals, to not fund any or all proposal, and/or to partially fund any and all proposals as submitted in response to this RFP. All proposals become the property of the GLWDB/City of Lowell.

## III. References

Provide 3 references. Include: Name of organization, name of contact person, address, phone number, e-mail address, how this contact is familiar with your work, the nature of the work performed, and the start/end dates of the work delivered.

**COMPARATIVE CRITERIA  
ONE-STOP CAREER CENTER OPERATOR**

	<b>Highly Advantageous</b>	<b>Advantageous</b>	<b>Not Advantageous</b>
<b>I. Eligibility/General Qualifications:</b> <ul style="list-style-type: none"> <li>• A proven track record with managing public workforce systems</li> </ul>	Strong understanding of WIOA laws and regulations; demonstrated experience providing services to job seekers and businesses.	Adequate understanding of WIOA laws and regulations; some experience providing services to job seekers and businesses.	Limited or no understanding of WIOA laws and regulations; no experience providing services to job seekers and businesses.
<b>II. Organizational Capacity and Alignment</b> <ul style="list-style-type: none"> <li>• Superior vision for providing demand-driven services</li> </ul>	Strong local and regional vision and plan aligned with Workforce Development Board strategies and initiatives.	Adequate vision and plan aligned with Workforce Development Board strategies and initiatives.	Limited vision for providing services to job-seekers and businesses.
<b>III. Program Elements and Implementation Plan</b>	Superior management and leadership skills; innovative and forward-thinking leadership; data-driven decision making; structured staff development and cross-training.	Adequate management and leadership skills; innovative and forward-thinking leadership; data-driven decision making; structured staff development and cross-training.	Limited management and leadership skills; innovative and forward-thinking leadership; data-driven decision making; structured staff development and cross-training.
<b>Seven tenets (pg. 28).</b>	<b>Satisfies all seven.</b>	<b>Satisfies most, but not all.</b>	<b>Satisfies few or none.</b>
<b>A. Population Served.</b>	Strong support for people with disabilities, Limited English Proficiency, and prioritized populations (i.e., recipients of public assistance, other low-income individuals, veterans, and individuals who are basic skills-deficient).	Adequate support people with disabilities, Limited English Proficiency, and prioritized populations (i.e., recipients of public assistance, other low-income individuals, veterans, and individuals who are basic skills-deficient).	Limited support people with disabilities, Limited English Proficiency, and prioritized populations (i.e., recipients of public assistance, other low-income individuals, veterans, and individuals who are basic skills-deficient).

<b>B. Required Elements</b>	Superior provision of career services and access to training and employment services and to activities carried out by all WIOA one-stop partners; Access to data, information, and analysis for the local labor market; Provision of job search, placement, recruitment, and employment activities.	Adequate provision of career services and access to training and employment services and to activities carried out by all WIOA one-stop partners; Access to data, information, and analysis for the local labor market; Provision of job search, placement, recruitment, and employment activities.	Limited or no provision of career services and access to training and employment services and to activities carried out by all WIOA one-stop partners; Access to data, information, and analysis for the local labor market; Provision of job search, placement, recruitment, and employment activities.
<b>1) Information Management</b>	Strong experience in working with a transactional customer database.	Adequate experience in working with a transactional customer database.	Limited or no experience in working with a transactional customer database.
<b>2) Marketing and Public Relations</b>	Strong marketing plan that includes ideas for marketing the One-Stop delivery system, a description of marketing techniques used in the past, and a strategy for assessing marketing success.	Adequate marketing plan that includes ideas for marketing the One-Stop delivery system, a description of marketing techniques used in the past, and a strategy for assessing marketing success.	Limited or no marketing plan that includes ideas for marketing the One-Stop delivery system, a description of marketing techniques used in the past, and a strategy for assessing marketing success.
<b>3) Service Integration and Coordination</b>	Strong experience with supervision within a multi-partner environment similar to a One-Stop	Adequate experience with supervision within a multi-partner environment similar to a One-Stop	Limited or no experience with supervision within a multi-partner environment similar to a One-Stop
<b>4) Program Design Satisfies Goals and Metrics of State WIOA Matrix</b>	Completely satisfies Goals and Metrics.	Partially satisfies Goals and Metrics.	Limited or no satisfaction of Goals and Metrics

<b>5) Workshops and Events</b>	Strong experience developing and providing employer and job-seeker workshops, hiring events, job fairs, and other related services	Adequate experience developing and providing employer and job-seeker workshops, hiring events, job fairs, and other related services	Limited or no experience developing and providing employer and job-seeker workshops, hiring events, job fairs, and other related services
<b>6) Facility Responsibilities</b>	Strong experience in managing a property with multiple tenants; strong assurance that facility will comply with the Americans with Disabilities Act that meets the intent, not just the letter of the law Provide; detailed customer flow chart used in an environment similar to a One-Stop; strong description of process by which facility needs are identified; strong experience coordinating an office move.	Adequate experience in managing a property with multiple tenants; strong assurance that facility will comply with the Americans with Disabilities Act that meets the intent, not just the letter of the law Provide; adequate customer flow chart used in an environment similar to a One-Stop; adequate description of process by which facility needs are identified; strong experience coordinating an office move.	Limited or no experience in managing a property with multiple tenants; strong assurance that facility will comply with the Americans with Disabilities Act that meets the intent, not just the letter of the law Provide; limited or no customer flow chart used in an environment similar to a One-Stop; strong description of process by which facility needs are identified; limited or no experience coordinating an office move.
<b>7) Time Line for Full Operation</b>	Time line includes strong description of the processes to hire staff; train staff; prepare space: electronic access for all staff available, e-mail accounts assigned, moving time and readiness to begin functions; and full operation in place; all services functional, all agreements in place.	Time line includes adequate description of most of the processes to hire staff; train staff; prepare space: electronic access for all staff available, e-mail accounts assigned, moving time and readiness to begin functions; and full operation in place; all services functional, all agreements in place.	Time line includes limited or no description of the processes to hire staff; train staff; prepare space: electronic access for all staff available, e-mail accounts assigned, moving time and readiness to begin functions; and full operation in place; all services functional, all agreements in place.

<b>8) Involvement of Local Employers, Business, and Community Resources</b>	Strong explanation of how coordination between partnering or subcontracting organizations was met, and how coordination in services will be provided.	Adequate explanation of how coordination between partnering or subcontracting organizations was met, and how coordination in services will be provided.	Limited or no explanation of how coordination between partnering or subcontracting organizations was met, and how coordination in services will be provided.
<b>9) Experience Creating One-Stop Business Plan with Partners</b>	Strong experience creating One-Stop business plans and strong description of partner staff involvement. Includes attached example of business plan.	Adequate experience creating One-Stop business plans and adequate description of partner staff involvement. Includes attached example of business plan.	Limited or no experience creating One-Stop business plans and adequate description of partner staff involvement. Limited or no attached example of business plan.
<b>10) Integrated Service Delivery</b>	Strong description of integrated services and workflow in the One-Stop Center(s), resulting in seamless service delivery. Strong description of vision of how seamless service delivery will be accomplished in a collaborative atmosphere.	Adequate description of integrated services and workflow in the One-Stop Center(s), resulting in seamless service delivery. Adequate description of vision of how seamless service delivery will be accomplished in a collaborative atmosphere.	Limited or no description of integrated services and workflow in the One-Stop Center(s), resulting in seamless service delivery. Limited or no description of vision of how seamless service delivery will be accomplished in a collaborative atmosphere.
<b>11) Letters From Partners</b>	Strong letters of support from key partners.	Adequate letters of support from key partners.	Limited or no letters of support from key partners.
<b>12) Industry/Sector Partnerships</b>	Strong experience working with industry partnerships and/or sector initiatives, and explanation of how you plan to emphasize this in your business plan.	Adequate experience working with industry partnerships and/or sector initiatives, and explanation of how you plan to emphasize this in your business plan.	Limited or no experience working with industry partnerships and/or sector initiatives, and explanation of how you plan to emphasize this in your business plan.

<b>IV. Performance Measures</b>	Demonstrated experience and resources for implementing and managing workforce performance outcomes; Federal, State and Local criteria and measures.	Adequate experience and resources for implementing and managing workforce performance outcomes; Federal, State and Local criteria and measures.	Limited or no experience and resources for implementing and managing workforce performance outcomes; Federal, State and Local criteria and measures.
<b>V. Fiscal Accountability</b>	See below.		
<b>A. Financial Capacity</b>	Strong description of the administrative and financial management capabilities of the organization. Strong explanation of how contracted funds will be kept separate from other funds; how financial information will be made available for monitoring and auditing purposes; qualifications of the organization's key program management and financial staff, and to what extent they will be involved with the project.	Adequate description of the administrative and financial management capabilities of the organization. Adequate explanation of how contracted funds will be kept separate from other funds; how financial information will be made available for monitoring and auditing purposes; qualifications of the organization's key program management and financial staff, and to what extent they will be involved with the project.	Limited or no description of the administrative and financial management capabilities of the organization. Limited or no explanation of how contracted funds will be kept separate from other funds; how financial information will be made available for monitoring and auditing purposes; qualifications of the organization's key program management and financial staff, and to what extent they will be involved with the project.
<b>1) Grants Management Experience</b>	Strong experience administering federal grants and previous funding received from a Massachusetts Workforce Region; managing subcontracts for services including monitoring of subcontractors; ensuring proper fiscal oversight and accountability of subcontractors.	Adequate experience administering federal grants and previous funding received from a Massachusetts Workforce Region; managing subcontracts for services including monitoring of subcontractors; ensuring proper fiscal oversight and accountability of subcontractors.	Limited or no experience administering federal grants and previous funding received from a Massachusetts Workforce Region; managing subcontracts for services including monitoring of subcontractors; ensuring proper fiscal oversight and accountability of subcontractors.

<b>2) Cost Reimbursement and Contract Experience</b>	Strong experience managing cost reimbursement contracts; strong description of organizations plan to fund start-up costs of contract, and ability to fund costs of doing business until first invoice can be submitted and paid by the Board’s fiscal agent.	Adequate experience managing cost reimbursement contracts; adequate description of organizations plan to fund start-up costs of contract, and ability to fund costs of doing business until first invoice can be submitted and paid by the Board’s fiscal agent.	Limited or no experience managing cost reimbursement contracts; limited or no description of organizations plan to fund start-up costs of contract, and ability to fund costs of doing business until first invoice can be submitted and paid by the Board’s fiscal agent.
<b>3) Attached Audit Reports</b>	Attached copy of two most recent audit reports.	Attached incomplete copies of two most recent audit reports.	Failed to attach copy of two most recent audit reports.
<b>i. Other Work</b>	Strong description of other work organization plans to carry out contemporaneous with One-Stop services, and estimate of what percentage of overall work for the organization would be represented by this contract.	Adequate description of other work organization plans to carry out contemporaneous with One-Stop services, and estimate of what percentage of overall work for the organization would be represented by this contract.	Limited or no description of other work organization plans to carry out contemporaneous with One-Stop services, and estimate of what percentage of overall work for the organization would be represented by this contract.
<b>ii. Major Funding Sources</b>	Complete description of the organization’s major funding sources. If the proposal is from two or more organizations, whether partners or subcontractors, provide the major funding sources for each.	Partial description of the organization’s major funding sources. If the proposal is from two or more organizations, whether partners or subcontractors, provide the major funding sources for each.	Limited or no description of the organization’s major funding sources. If the proposal is from two or more organizations, whether partners or subcontractors, provide the major funding sources for each.
<b>iii. Proof of Insurance</b>	Insurance certificate or letter from insurer indicating insurance will become available before the contract becomes effective.	No proof of insurance.	No proof of insurance.

<b>B. Budget</b>	Strong experience in budget management, including a revenue plan that supports the local plan, target populations and sustainability.	Adequate experience in budget management, including a revenue plan that supports the local plan, target populations and sustainability.	Limited or no experience in budget management including a revenue plan that supports the local plan, target populations and sustainability.
<b>VI. References</b> <ul style="list-style-type: none"> <li>• <b>Strength and credibility of references</b></li> </ul>	The proposal indicates ten or more strong and credible client references with contact information.	The proposal indicates five – nine strong and credible client references with contact information.	The proposal indicates less than five strong and credible client references with contact information.

## IV. Program Proposal - Instructions & Narrative

### A. Format Requirements

**Pages:** Proposals must be typed, may be single spaced, and must be submitted on 8 ½ by 11-inch plain white paper in 12-point font with 1 inch margins. The use of recycled paper is encouraged. Double-sided submissions are acceptable, as long as each page is clearly legible. Each page of the proposal, with the exception of the cover sheet should be numbered with the name of the bidder on each page. Use the same topic headings, in the same order, as described in Proposal Narrative Requirements section below.

**Page Limit:** Avoid extraneous narrative and data. While this RFP does not limit the number of pages and attachments, the successful Bidder will demonstrate its ability to communicate relevant information to the GLWDB for objective decision-making in a clear and concise manner. Clear and concise answers are preferred. Referring the reviewer to another section of the proposal for information is preferred to repeating the information.

**Number of copies: One complete original**, (marked as original) with executed certificates (original signatures of the authorized signatory), plus **seven (7)** exact copies must be submitted for a total of **eight (8) complete proposals**, along with one (1) electronic copy (in .pdf format via a USB flash drive).

**Authorized Signatory Authority:** The bidder's authorized signatory authority must sign all signature documents in the proposal. This individual should typically be the director, president or chief executive officer of the organization or any individual who has the authority to negotiate and enter into and sign contracts on behalf of the bidder's organization.

**Contact Information:** Bidders should provide contact information for the individual(s) who can respond to questions regarding the proposal.

**Order of Submission:** The proposal should be submitted in the order outlined below:

- I. Proposal Cover Sheet – **Appendix 1: Cover Sheet**
- II. **Table of Contents**, indicating the beginning page for each section and major subsection of the Response, including each attachment.
- III. Executive Summary
- IV. **Proposal Narrative** – Follow the order in the Proposal Narrative Requirements describe in *Section B. Proposal Narrative Requirements* below, using the same titles for section headings.
- V. Budget and Budget Narrative
- VI. **Assurances and Certifications** – Follow the order in the Appendices.
- VII. **Attachments** – May be attached at the bidder's discretion, but bear in mind the Board's desire to limit extraneous narrative and data. Elaborate or expensive bindings, videos, colored displays, and promotional materials are neither necessary nor desired.

### B. Proposal Narrative Requirements

The following requirements apply:

## 1. Bidder Eligibility

- Demonstrate your organization's eligibility to participate as a WIOA One-Stop Operator. Please include your organization's incorporation status and where incorporated, along with that of any partners or subcontractors included in your proposal.

## 2. Organizational Capacity and Alignment

- Briefly describe your organization's mission and/or vision. How does it align with WIOA Program Goals? Why is your organization in the best position to deliver an innovative One-Stop delivery system?

### A. Experience:

- Provide examples of types of relevant contracts the bidder has previously entered into, including type of contracting entity, location of the work, and general types of services provided. Include a description of the bidder's past experience with the One-Stop service delivery model under WIA/WIOA or similar programs. Describe any major workforce development achievements the organization has experienced outside of WIA/WIOA federal performance standards.
- If the organization has previously delivered WIA/WIOA services, or has overseen delivery of WIA/WIOA service contracts, please provide performance data for the most recent two program years available and most recent program monitoring report in an attachment. Cite the page number for the attachment in this portion of the narrative.

**Qualified bidders must have experience analyzing and anticipating workforce demand, and they must be able to demonstrate that they have successfully assisted in meeting that demand through services intended to prepare workforce participants for entry into in-demand fields.**

- Describe your organization's experience, and discuss your organization's successes in meeting workforce demand. How has the business landscape changed as a result of your services? Are businesses better able to find workers with the appropriate skills? How has the workforce landscape changed as a result of your services? Are there fewer unemployed or underemployed workers?

### B. Data and Performance Management:

**The successful applicant will be responsible for tracking services and outcomes in the state case management Massachusetts One-Stop Employment System (MOSES) as well as the local data metrics currently under development. Staff of the One-Stop Operator will be required to complete MOSES training within three months of the award announcement for the Local Workforce Development One-Stop Operator contract.**

**The provider will be accountable for the integrity of the data presented and responsible for ensuring that staff is appropriately trained in the use of these systems.**

- Explain how accountability and integrity will be assured throughout the system for this automation. It is intended that the MOSES data system will serve as the primary information management system for the

One-Stop Center, without external supplementation. However, if it is your intent to supplement this with any other information management system(s), please explain. Explain your understanding of automated management systems and their connection to performance standards.

**The One-Stop Operator will be responsible for developing, implementing and overseeing processes to collect, manage and utilize information about the system.**

- How do you measure success for the One-Stop delivery system? How would you track the performance measures as described in *4.A Program Outcomes and Deliverables (p. 31)*? Describe the strategies to be implemented to ensure federal and state performance standards and local objectives will be achieved; describe the methods to be used to measure and track success in addressing the primary objectives outlined in *4.A Program Outcomes and Deliverables (p. 31)*.
- Describe how monthly reports will be submitted. Describe your approach to identifying points in performance that would be “triggers” to take action to avoid performance failure, and how information will be used to make decisions that will improve efficiency and effectiveness. How will you ensure that providers input timely data entry on program participants and validate program eligibility? Give examples of midcourse corrections made in order to ensure successful outcomes.

**The successful applicant must identify assessment instruments to be used and must demonstrate how assessment data will be tracked. Assessment instruments identified should address primary objectives by assisting the service provider in identifying skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills gaps), and supportive service needs and should lend themselves to pre- and post-assessment opportunities to ensure aggregate data can be tracked.**

- Identify assessment instruments that will be utilized and demonstrate how assessment data will be tracked
- Provide an assurance that data will be tracked and reported in accordance with all applicable requirements utilizing the MOSES or applicable reporting system(s).

**C. Organizational Structure & Proposed Staff:**

**The operator will be required to either name an individual to act as the full-time One-Stop System Executive Director, or describe the desired qualifications of a new hire.**

- If the individual has already been identified, provide a resume. If the individual will be a new hire, list the qualifications, process for selection, and timetable you will use to identify and hire an appropriate person.
- Describe how the Executive Director will function in a supervisory capacity at the Center, in particular when dealing with functional supervision of state, merit-based staff that, in many cases, would not be direct reports.

- Describe any other staff that the bidder believes would be necessary to the success of the operator function. The proposal must include job descriptions for all positions in the organization affiliated with the One-Stop delivery system. Additionally, resumes are required for all organization personnel affiliated with the One-Stop delivery system. For any positions for which no staff have been identified, describe the qualifications sought and the process by which individuals will be selected. Address how you will comply with the right to interview requirements of Section I.I. Interview Rights to Jobs Created (p. 11) in this RFP.
- Provide an organizational chart that shows how the staff will fit into the bidder's overall organization.
- Describe what process will be used to determine whether personnel are suitable to work with vulnerable populations and in the languages other than English most common in our community (Spanish, Khmer, Portuguese, etc.).
- How will you manage staff communications and staff satisfaction? How will you manage the process for addressing center grievances (internal and external)? Provide an overview of how you will address staff-turnover and training. How will staff development plans be created and managed?
- If the entity has a board, identify them as well as their affiliations.

### **3. Program Elements / Implementation Plan**

The Greater Lowell Workforce Development Board has established a One-Stop Delivery system that serves as a community resource for both job seekers and employers to increase the efficiency with which the right person is matched with the right job, and to offer an abundance of career exploration and job readiness resources in a user-friendly, customer-focused, results-driven environment. This system is based on the following WIOA principles:

- Demand Driven focus
- Streamlining services
- Empowering individuals
- Universal access
- Increased accountability
- Strong leadership, oversight and management roles for local Workforce Boards and the private sector
- Local flexibility
- Improved youth programs

#### **Minimum Requirements:**

In addition the Greater Lowell Workforce Board has established the following tenets that must be followed by the successful bidder for one-stop operator in the Greater Lowell workforce region:

1. The one-stop is in a visible location, meets all accessibility standards and presents a professional, well-maintained environment. The location must be accessible to on-street/garage/lot parking and be within walking distance to public transportation. The location must also be ADA compliant. \*The current location lease is transferable with approval of existing landlord.
2. The one-stop will provide quality service to all job seekers regardless of age and to all businesses regardless of size or industry type, using data as well as customer input to drive both improvement and quality service. The one-stop will also provide services to special populations and critical industry sectors outlined in the GLWDB Strategic Plan.
3. The one-stop will be run efficiently using Lean and/or other system approaches ensuring efficient and effective investment of public funds and resulting in the attainment of WIOA and other grant goals.
4. The one-stop must partner with the GLWDB to bring in other resources beyond WIOA and must implement services provided through these resources in a seamless fashion to both businesses and job seekers.
5. The one-stop must fully incorporate WIOA-mandated and other community partners in career center operations through integrated staff management and must also provide services at both the center and in the community (i.e. out stationing).
6. The One-Stop services and outcomes are Demand-Driven and are monitored closely through labor market information and industry sector initiatives that require forward thinking and innovative programming, and
7. The one-stop will be fully aligned with the GLWDB strategic plan, providing consistent focus on the critical and emerging industries in the region.

To this end, the GLWDB will consider proposals representing the supportive elements of information management, marketing and public relations, service integration and coordination, and facility coordination.

Attachment B displays One-Stop Standards that all bidders must demonstrate their ability to achieve. This list is not all-inclusive, additional items will be added as priorities and the needs of business and job-seekers change based on the local economy and other factors. The Commonwealth of Massachusetts will measure One Stop Career Centers on these Standards. It is highly recommended to consider the Standards when developing your program elements/implementation plan.

**A. Population Served:**

- Describe the population to be served (target population and eligibility). Discuss your philosophy, approach and implementation plan for outreach and recruitment of diverse target groups. Address how the Center will serve people with disabilities, Limited English Proficiency, and prioritized populations (i.e., recipients of public assistance, other low-income individuals, veterans, and individuals who are basic skills-deficient).
- Discuss how you would manage your assessment and referral process. How would you supervise this function to ensure accuracy? How will you determine appropriateness to minimize the risk of public

investment? Not all customers will be determined eligible or appropriate, but the program should still address their workforce needs. Describe the process for ensuring these individuals do not “fall through the cracks.”

- Discuss varying orientation techniques for the Center and the system as a whole. How will you ensure that people who come to the Center will know about the services and programs available? Discuss how these sessions may be coordinated with other partners in the One-Stop. Propose the content of customer orientation.
- Include where and how services will be delivered to meet the needs of the target population.

#### **B. Required Elements:**

**The One-Stop Operator will be responsible for development and on-going functioning of the GLWDB One-Stop delivery system and center(s). The One-Stop system shall include but not be limited to:**

- **Provision of career services;**
- **Access to training services;**
- **Access to employment and training activities;**
- **Access to programs and activities carried out by all WIOA one-stop partners;**
- **Access to data, information, and analysis for the local labor market;**
- **Provision of job search, placement, recruitment, and employment activities.**

**Bidders are encouraged to read the WIOA to understand the scope of authorized activities.**

- Describe how required activities will be provided. Describe creative or innovative ideas you have for one-stop system services and how you would implement those ideas (demonstrate knowledge of best practices or evidence-based practices).

#### Information Management:

- Describe your experience in working with a transactional customer database such as the Massachusetts One-Stop Employment System (MOSES) or another. This may also include on-line tools that jobseekers and one-stop staff could utilize in their job search such as TORQ or similar.

#### Marketing and Public Relations:

- Describe how you will develop an overall marketing plan. Include your ideas for marketing the One-Stop delivery system and describe marketing techniques you have used in the past. How will you evaluate the effectiveness of marketing strategies? How will you assist the staff in developing a public image for the center(s) and improve public relations? Describe any abilities of the bidder’s firm to develop / manage a One-Stop website.

Service Integration and Coordination: *It is the GLWDB’s expectation that the center staff of all programs will be organized by function, not by program and with a successful outcome in mind for both the employer and the job seeker.*

- How will you develop and implement a functional approach to multi-partner office operations? Describe your experience with supervision within a multi-partner environment similar to a One-Stop. Describe the process by which operational procedures will be developed.
- If the proposal is from two or more organizations, whether partners or subcontractors, explain how those organizations achieved the coordination necessary to submit the proposal and how that collaborative effort will be maintained throughout service delivery. Describe how services will be coordinated if the organization applying is partnering with another entity or entities (via subcontract) to provide the required elements.

**The Operator will be responsible for working with all partners to create a One-Stop Business Plan.**

- Describe your experience in creating one-stop business plans and how partner staff were involved. Attach an example and cite the page number of the attachment.

**The Greater Lowell workforce Board has requested that all partners support an integrated model of service delivery as much as possible to be able to provide seamless services to any person entering the Center.**

- Describe how you might integrate services and workflow in the One-Stop Center(s) that will result in seamless service delivery. What is your vision of how seamless service delivery will be accomplished in a collaborative atmosphere?
- Include letters from key partners you plan to collaborate with. *Bidders should only include key partners such as community-based organizations or partner programs. Do not include supportive service vendors.*
- Describe your experience in working with industry partnerships and/or sector initiatives. How do you plan to emphasize this in your business plan?

**In addition, the State WIOA Performance Committees have established One Stop Career Center Standards (Attachment B).**

- Describe how their program design will support these standards so that metrics for WIOA service providers, co-located and non-co-located partners will be met.

*Workshops and Events: The One-Stop Operator will be expected to coordinate with the Service Provider representatives under the WIOA program and other co-located partners, as well as fulfill business service responsibilities that include developing and providing employer and job-seeker workshops, hiring events, job fairs, and other related services.*

- Describe your related experiences in these areas. Workshops may be topical (financial literacy, parenting, etc.) or career-related (job search workshops, mock interviews, etc.). Describe the process to ensure that workshops will be relevant and beneficial to clients, as well as the process for determining frequency and timeliness of workshops/events/special programs.

*Facility Responsibilities:*

- Describe your experience in managing a property with multiple tenants. How will you provide management of facilities, property, and inventory for the One-Stop Center?
- Describe how you will ensure facility compliance with the Americans with Disabilities Act that meets the intent, not just the letter of the law.
- How will you develop a plan for assessing the best flow of traffic design (Provide an example of a customer flow chart that you have operated under in a one-stop environment and the principles behind the selected customer flow).
- Describe how facility needs and requirements will be identified. How will facilities be used to maximum potential (include usage of community rooms, leasing of office space, and generation of rental revenue).
- Describe the rationale, facilities, and any experience you have had with an office move.
- Prepare a time line for full operation of services, assuming full operation of a contract by July 1, 2017. At a minimum, include:
  - Hiring of staff;
  - Training of staff;
  - Preparation of space: electronic access for all staff available, e-mail accounts assigned, moving time and readiness to begin functions; and
  - Full operation in place; all services functional, all agreements in place.

### **C. Service to Businesses**

- Describe your plan for a "job-driven/demand-driven" One-Stop Career Center system? How might it differ from traditional One-Stop Career Center structures and practices?
- What percentage of your staff and how much of your overall resources will be focused on business/employer services? Describe your process for developing employer relationships/partnerships? Describe the flow of services to employers.
- What is your plan for coordinating business services with WIOA Core Partners, who may have their own business outreach and engagement goals?
- Describe any specific experiences in developing On-the-Job/Apprenticeship contracts and what were their results?
- Describe your process for working with industry partners and/or sector initiatives. How do you plan to emphasize this in your service delivery?

- Describe the processes for receiving employer feedback from employers and continuous quality improvement of services to employers?
- Describe your process for managing labor market cycles to meet the demand-driven needs of the Greater Lowell Workforce Development region? What is the process for ensuring that staff knowledge of the labor market is consistently up-to-date? How will you share labor market information with your staff?

#### 4. Program Outcomes and Deliverables

**The GLWDB is required to establish local performance measures in order to evaluate program effectiveness and achieve continuous improvement in the delivery of Workforce Innovation and Opportunity Act programs.**

##### A. Performance Measures:

- Provide an evaluation plan including benchmarks, data collection points, proposed analyses, and persons/positions accountable for the Performance Measures you propose to implement for your One-Stop Operator proposal.

**In addition to One-Stop Operator Performance Measures proposed, the GLWDB may negotiate quarterly benchmarks with the provider by which contract performance of the provider will be measured. The provider will report performance measures to the GLWDB on a monthly basis.**

**Achievement of measurable Performance Outcomes is a critical expectation of the WIOA Adult, Dislocated Worker, and Youth Work Development Service Providers, who are accountable for the 15 WIOA measures listed below (an employer measure will be determined and added by the second program year).**

Adult	Dislocated Worker	Youth
Employment Rate (2 <sup>nd</sup> quarter after exit)	Employment Rate (2 <sup>nd</sup> quarter after exit)	Placement in Employment, Education or Training (2 <sup>nd</sup> quarter after exit)
Employment Rate (4 <sup>th</sup> quarter after exit)	Employment Rate (4 <sup>th</sup> quarter after exit)	Credential Rate (within 1 year after exit)
Median Earnings (2 <sup>nd</sup> quarter after exit)	Median Earnings (2 <sup>nd</sup> quarter after exit)	Placement in Employment, Education, or Training (4 <sup>th</sup> quarter after exit)
Credential Rate (within 1 year after exit)	Credential Rate (within 1 year after exit)	Median Earnings (2 <sup>nd</sup> quarter after exit)
Measurable Skills Gain (real time measure)	Measurable Skills Gain (real time measure)	Measurable Skills Gain (real Time measure)

- Provide a description of how the One-Stop Operator will support WIOA service providers and all co-located partners in attaining their Performance Outcome goals? What metrics will allow you to evaluate your support of these goals?

- Describe your approach to continuous improvement, including how you will develop additional means for “listening to the customer” beyond written surveys. These could include tools such as Customer Centered Design. How will you ensure all feedback is evaluated? How will you work with the partners to address concerns and service gaps?

**B. Managing Performance Outcomes:**

- Discuss your organization’s approach to managing performance outcomes, including any additional indicators of performance you have experience managing and believe to be relevant to this RFP.
- Describe the strategies to be implemented to ensure federal and state performance standards and local objectives will be achieved. Describe the methods to be used to measure and track success in addressing primary objectives.

**5. Fiscal Accountability**

- Provide a description of the administrative and financial management capabilities of the organization. How will contracted funds be kept separate from other funds? How will financial information be made available for monitoring and auditing purposes? What are the qualifications of the organization’s key program management and financial staff, and to what extent will they be involved with this project?
- Describe your organization’s previous experience administering federal grants and previous funding received from a Massachusetts Workforce Region. If you are proposing a subcontracting model, do you have experience in managing subcontracts for services including monitoring of subcontractors? How do you ensure proper fiscal oversight and accountability of subcontractors?
- Describe your experience with cost reimbursement contracts. How will you provide and fund the start-up costs of the program? Describe how the Bidder’s organization will financially support the costs of doing business until an invoice can be submitted and paid by the Board’s fiscal agent.
- Provide a copy of the two most recent audit reports for the bidding entity as an attachment, and cite the page number of the attachment in this section of the narrative.
- Describe any work you are doing or may be proposing to do in addition to this contract. Estimate what percentage of your overall organization’s work would be represented by this contract.
- Include the organization’s major funding sources. *If the proposal is from two or more organizations, whether partners or subcontractors, provide the major funding sources for each.*

**A Certificate of Insurance is required from the selected applicant when the contract is executed. All Certificates of Insurance must name the City of Lowell as additionally insured. Certification of Insurance Coverage should include:**

- Statutory workers compensation and employer's liability insurance;
- Comprehensive, all risks general liability coverage for personal injury and property damage
- Liability of not less than \$1 million for each occurrence and \$2 million annual aggregate;
- Comprehensive automobile bodily injury and property damage coverage liability of not less than \$1 million combined single unit.
- Professional Liability Insurance in the amount of \$1 million each wrongful act/\$2 million aggregate.

## **V. Price Proposal**

### **A. 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

\_\_\_\_\_ 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)

## B. 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. (See Appendix 2 for required attachments)***

- Signatory Authorization for Corporate Providers (If Applicable)
- Signatory Authorization for Non-Corporate Providers (If Applicable)
- Certification Regarding Debarment, Suspension and Other Responsibility Matters
- Certificate of Non Collusion
- Evidence of Commitment to Equal Opportunity, Nondiscrimination, and Affirmative Action
- Certificate of Lobbying Activities

## C. Budget

### **Budget:**

Please complete the budget forms from pages 37 through 39. Costs included in the proposed budget cannot already be paid by another source; they must be actual costs incurred in delivering the proposed services, and these funds cannot supplant funds already received by the proposing organization. Please note that while an “other” category is included, cost should be categorized as “other” judiciously. All costs should be accounted for in the budget line items supported by a strong narrative justifying why the funds are needed/critical to the program.

Give details of the organization's cost allocation method if one is used; e.g., prorating the cost of supplies based on the number of staff, or the cost of salaries based on percentage of time spent on this contract. Please also include details of the organization’s indirect cost rate, along with how it was determined, if one is used.

State what contingency plans are in place to repay the GLWDB in the event that there are any disallowed costs as a result of an audit or monitoring review.

\*A detailed budget for the current operator can be located on the City of Lowell website:

<http://www.lowellma.gov/citymanager/Pages/default.aspx>

**Form A: Budget Summary**

**Form B Budget Detail**

**Form A**  
**Budget Summary**

LINE ITEMS	Total Grant Funds	Match/ Leveraged Funds (Non- WIOA)
<b>Personnel (all proposed Career Center Staff)</b>		
<b>Fringe (Fringe Benefits related to above)</b>		
<b>Training (30% Allocation minimum) *</b>		
• Adult & Dislocated Worker Occupational Skills Training (ITA)		
• Adult & Dislocated Worker Occupational Skills Training (Group Training)		
• Adult & Dislocated Worker On The Job Training		
• All other training		
<b>Premises (all costs related to the operation of your facility)</b>		
<b>Citrix/MOSES Fee (the cost of accessing the state's MOSES database) See Attachment B</b>		
<b>Information Technology (all it costs to operate OSCC)</b>		
<b>Non Personnel Services - other (all non-personnel costs not included above)</b>		
<b>Indirect /DeMinimus **see below</b>		
<b>Other</b>		
<b>Support Services</b>		
<b>Total</b>		

**\*30% of WIOA Adult and Dislocated Worker combined must be spent on training**

**\*\*Unless exempt, all Indirect costs must be accompanied by an approved rate from a cognizant agency.**

**Municipalities are exempt from the Indirect rate requirement and may allocate indirect costs based on an allocation**

**Form B**  
**Budget Detail**

Please complete the budget detail form as directed. All grant funds need to be included in the “Total Career Center Costs Grant Funds” column. All funds devoted to the Career Center operation but not charged to the grants funds available in this solicitation must be listed in the Leveraged/Match column.

**1. Salaries and Wages:**

Provide a breakdown of your staff costs by completing the following (attach additional space if necessary):

Position/Title (list all proposed positions)	Hourly Rate	Total Hrs. Per Week Worked	Hrs. per Week Charged to Career Center	# Weeks Charged to Career Center	Total Career Center Cost Grant Funds	Total Leveraged/Match
<b>Total:</b>						

**2. Fringe Benefits:**

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

Fringe Benefit	% Benefit is of Salaries	Total Career Center Cost Grant Funds	Total Leveraged/Match
FICA			
Worker Compensation			
Health Insurance			
Retirement			
Other			
<b>Total:</b>			

**3. Job Seeker Training Costs – must equal at least 30% of all Adult and Dislocated Worker Program Costs to Career Center**

Training costs include occupational training in the form of Individual Training Accounts, Group Training, On-the-Job (OJT) Training for Adults or Dislocated Worker programs. Definitions for these trainings are found in the WIOA. WIOA Youth training costs will be handled directly by the GLWDB.

Training Type	Number of job seekers receiving training service	Average Cost Per job seeker	Total Career Center Cost Grant Funds	Total Leveraged/ Match
Individual Training Accounts (ITA)				
Group Training				
On the Job Training				
Other Training				
<b>Total:</b>				

**4. Other Line Items:**

List your proposed cost for each additional line item wherever applicable. Indicate the total cost proposed for each line item by listing it under the Total Career Center Cost column. Line items paid for by other resources, either in part or in full, should have such costs represented in the Leveraged/Match column. Please note that the line items listed below reflect the types of costs that have historically been proposed. You are not limited to these, nor are you required to propose a cost for each one.

	Description of Expense	Cost Basis of Expense	Total Career Center Cost Grant Funds	Total Leveraged/ Match
	Premises			
	Citrix/MOSES fee			
	Information Technology			
	Indirect/ Deminimus			
	Other costs			
	Support services			
<b>Total:</b>				

**GRAND TOTAL (A+B+C) (must correspond with the total figures on the Budget Summary Sheet)**

Grand Total:	Total Career Center Cost Grant Funds	Total Leveraged/ Match

## D. Budget Narrative: WIOA One-Stop Operator

- Include staff positions, percentage of time dedicated to each position, proposed wage/salary and justification for including each position in this proposal.
- Indicate the number of hours or days of vacation and sick leave that the staff are permitted.
- Justify each proposed expense included on the budget attachment in terms of it being necessary, allowable and reasonable. Show the method of computation (i.e., insurance = salary x 2.35%).
- Describe any anticipated professional development opportunities and how you estimated the costs.
- Identify any in-kind resources/support for the one-stop work beyond what is requested in the budget.
- Include each committed or proposed source of funding and the amount of that funding.
- Explain how you arrived at your estimate for dues, membership, and publications, and what memberships and subscriptions are anticipated.

# Appendix 1: Cover Sheets

## A. Program Proposal Cover Sheet

<b>Request for Proposal 17-24 for One-Stop Operator Services Program Proposal</b>	
Bidder Name:	_____
Street Address:	_____ _____
Taxpayer Identification Number:	_____
Contact Name:	_____
Telephone:	_____
Email Address:	_____
Fax:	_____
Authorized Signature:	_____
Name:	_____
Title:	_____
Date:	_____

**B. Price Proposal Cover Sheet**

<b>Request for Proposal 17-24 for One-Stop Operator Services Price Proposal</b>	
<b>Applicant Name:</b>	_____
<b>Address:</b>	_____ _____
<b>Proposal Contact Person:</b>	_____
<b>Proposal Contact Title:</b>	_____
<b>Telephone/Cell Phone:</b>	_____
<b>E-mail:</b>	_____
<b>Website:</b>	_____

**Total Funding Requested:** \$ \_\_\_\_\_

**Total Number of Job Seekers to be served:** \_\_\_\_\_

**Total Number of Businesses to be served:** \_\_\_\_\_

I hereby certify that the information provided in this submission is accurate.

\_\_\_\_\_  
(Print Name / Title) Signature

I hereby certify that I am duly authorized to sign contracts on behalf of this organization.

\_\_\_\_\_  
(Print Name / Title) Signature



## 2. 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: \_\_\_\_\_

### 3. 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 to 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

#### 4. 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)

**5. 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)

---

## 6. Certification of Lobbying Activities

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

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

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

## Appendix 3: Statement of Assurances

The undersigned party acknowledges and assures that (Provider Name)

\_\_\_\_\_ and all of its employees responsible for providing the services for which it has applied will abide and comply fully with all state, federal, and local, laws, ordinances, rules, regulations and/or executive orders, including but not limited to provisions of the laws listed below:

- WIOA Section 188, which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA Title I-financially assisted program or activity;
- Title VII of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color and national origin;
- Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities;
- The Americans with Disabilities Act (ADA) of 1990 which prohibits discrimination against qualified people with disabilities based on disability;
- The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age;
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs;
- Debarment and Suspension (Executive Orders 12549 and 12689) – A contract award (see 2 CFR § 180.220) must not be made to parties listed on the government-wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.52.<sup>1</sup>

29 CFR Part 38 and all other regulations implementing the laws listed above. This assurance applies to the operation of the WIOA Title I-financially assisted program or activity, and to all agreements the contractor makes to carry out the WIOA Title I-financially assisted program or activity. The undersigned understands that the United States has the right to seek judicial enforcement of this assurance.

Name and Title of Authorized Representative

\_\_\_\_\_  
Name (Signature)

\_\_\_\_\_  
Date

<sup>1</sup> Appendix II to 2 CFR Part 200 (the 2 CFR )

## Attachment A: Available Career Center Funds Per FY17 Budget

Grant Name	FY17 Career Center Revenue	Funds Reserved For Vendors	Net Career Center Revenue	Funding For State Staff	Description of Grant
UI Hearings	\$47,376	\$0	\$47,376	\$0	Unemployment claim hearings
UI Walk-In	\$17,202	\$0	\$17,202	\$113,644	Services for Unemployment Claimants
RESEA	\$49,158	\$0	\$49,158	\$243,936	Services for job seekers profiled as at risk of being long-term unemployed
Wagner-Peyser 90%	\$130,152	\$0	\$130,152	\$440,919	Employment service and job matching
Wagner-Peyser 10%	\$25,616	\$0	\$25,616	\$0	Employment service and job matching
DVOP	\$10,441	\$0	\$10,441	\$72,272	Services for disabled veterans
CIES	\$294,612	\$0	\$294,612	\$0	Services to integrate DTA recipients into the workforce
State One Stop	\$118,661	\$0	\$118,661	\$0	Support funding for OSCC
DEI Youth *	\$87,064	\$0	\$87,064	\$0	Services for disabled youth job seekers
DEI	\$48,298	\$0	\$48,298	\$0	Services for disabled adult job seekers
WIOA Adult	\$528,315	(\$40,000)	\$488,315	\$0	Services for low income adults
WIOA Dislocated Worker	\$699,172	(\$250,000)	\$449,172	\$0	Services for dislocated workers
WIOA Youth	\$109,788	\$0	\$109,788	\$0	Subsidized work experience for WIOA youth
Youthworks Summer	\$470,120	\$0	\$470,120	\$0	Subsidized summer employment for at risk youth
Ma Housing Authority	\$28,038	\$0	\$28,038	\$0	Subsidized summer work experience for residents of public housing
Lowell Police Dept Shannon	\$85,000	\$0	\$85,000	\$0	Subsidized summer work experience for Lowell residents
Sage & Successful Youth Initiative	\$65,176	\$0	\$65,176	\$0	Subsidized summer work experience for at risk youth
Youthworks Year Round	\$65,938	\$0	\$65,938	\$0	Subsidized year round work experience for at risk youth
CDBG Youth	\$7,500	\$0	\$7,500	\$0	Subsidized year round work experience for area youth
Secure Jobs	\$50,769	\$0	\$50,769	\$0	Job development & placement services for homeless individuals
Trade Case Management	\$68,586	\$0	\$68,586	\$0	Services to individuals separated from employment as a result of trade treaties
Multiple Companies NEG	\$753,619	(\$323,000)	\$430,619	\$0	Services for workers dislocated workers from three area companies
Talent Connect	<u>\$11,034</u>	<u>\$0</u>	<u>\$11,034</u>	<u>\$0</u>	Services for the long-term unemployed
	<b>\$3,771,635</b>	<b>(\$613,000)</b>	<b>\$3,158,635</b>	<b>\$870,771</b>	

\* Scheduled to end in 2020

## Attachment B: One Stop Standards

STANDARD	CRITERIA	ELEMENTS	MEASURE					
			0	1	2	3	4	5
Cost Effectiveness	<ul style="list-style-type: none"> <li>Effective budget management</li> <li>Aligning resources with industry/occupation targets</li> <li>Strategies to increase/leverage resources</li> </ul>	A Balanced budget and revenue plan that supports the approved local plan, target populations and sustainability	No budget or plan	Balanced budget	Balanced budget that includes leveraged resources	Balanced budget includes all funding sources but does not support a consistent funding level	Balanced budget includes all funding sources and provides for contingencies	Balanced budget with all required and leveraged resources and addresses the ability to continue self-sustainability
		% training related placements for total occupational training participants is tied to job driven need identified in the local plan (less Trade and NDWG's)	Less than 30%	30%	31%-35%	36%-40%	41%-59%	60% or more
		Strategies and experience utilizing non-Federal, leveraged resources	No response	Demonstrated understanding of leveraged resources	Plan to secure leveraged resources	secured at least one source of leveraged funding	secured resources with outcomes that match annual plan	Consistently applies leveraged resources to meet workforce goals
Integrated Services	<ul style="list-style-type: none"> <li>Experience minimizing duplication</li> <li>Coordinated service to job seekers and business</li> </ul>	Describe how your structure of colocation works and provides access to Partner services	No response	Meets Comprehensive location minimum requirements only	Some partner, some services at some locations (but meets minimum Career Center requirements)	All Partners, all services at all locations		

	<ul style="list-style-type: none"> <li>Established operational procedures</li> <li>Experience integrating multi-partner structure</li> <li>Effective state/local partnering models</li> <li>Shared policy framework</li> </ul>	Describe your customer flow for all customers that includes triage, initial assessment and how shared customers are referred and served	No response	Joint case management with referral process to core partners and tracked outcomes	Experience triaging multiple partners and shared workflows, workshops, etc.	Policies in place and utilized with Partner involvement in setting procedures
		Describe your business flow for all business that includes triage, initial assessment and how shared businesses are referred and served	No response	Business flow includes all elements	Business flow includes all elements and some Partner engagement	Business flow includes all elements, demonstrates Partner engagement and shared policy framework
		Describe your plan for shared data outcomes	No response	Local MOU describes methodology for collecting and reporting on shared data	1-2 and Mechanism in place to collect shared data	1-4 and Shared data drives decision-making
<b>Federal and Local Performance</b>	<ul style="list-style-type: none"> <li>Capacity to track, address and meet metrics/standards for Federal/ state/local performance requirements</li> <li>Demonstrate understanding of measures</li> <li>Demonstrate understanding of MOSES functioning and uses</li> <li>Demonstrate via</li> </ul>	<ul style="list-style-type: none"> <li>Plan will meet Federal, state and local measures / dashboard</li> <li>Demonstrates understanding of measures/definitions (credentials, etc.)</li> </ul>	No response	Demonstrated capacity and capability to track, address and meet Federal, state and local performance requirements	Demonstrates strategies and mechanisms or techniques in place to track, address and meet Federal, state and local performance requirements	1-4 and demonstrates how it drives outcomes
		<ul style="list-style-type: none"> <li>Compliance measured via plan vs actual for dashboard measures</li> </ul>	No response	Has met all negotiated performance goals	1-2 and Demonstrates shared outcomes across core programs	1-4 and Drives outcomes

	experience with approach, process, evaluation	<ul style="list-style-type: none"> <li>• Demonstrates responsive outcomes for target groups- Demonstrated experience using approach/process/outcomes</li> </ul>				
<b>Demand Driven</b>	<ul style="list-style-type: none"> <li>• Demonstrate understanding of labor market, LMI data &amp; tools</li> <li>• Resources aligned &amp; solutions are responsive to business need &amp; input</li> <li>• Elicits job seeker/business customer feedback and responses are effective</li> <li>• Decisions &amp; strategies are based upon defined, evaluated data &amp; practices</li> <li>• Meets Federal/state/local criteria &amp; metrics</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates understanding/use of data via narrative &amp; outcomes</li> <li>• OSCC is responsive to the LMI blueprint</li> <li>• Meets Federal, state and local business measures</li> </ul> <ul style="list-style-type: none"> <li>• Demonstrates that use of tools &amp; data drives decisions and outcomes</li> <li>-Demonstrates key sector investments</li> <li>• Training offered is demand driven and refined based on need and data</li> <li>Identified career pathways that meet performance/dashboard measures</li> </ul>	No response	Demonstrates need based on LMI blueprint	Training and strategies are responsive to LMI Blueprint	Outcomes are improved based on new industry partners/employer engagement and successful grant seeking employment outcomes
			No response	Career Center decisions regarding strategies and approaches are driven by business data	Key sector investments and/or Career Pathways are business driven	Items 1-4 and training is continually refined by business demand

		<ul style="list-style-type: none"> <li>Evidence of customer Satisfaction</li> <li>Effective plan implemented for WIB/CC/customer outreach, integration &amp; collaboration</li> </ul>	No response	Elicits feedback	Demonstrates use of survey to drive operations and change	Demonstrates engagement of Partners
<b>Maximizing Access for Job Seekers and Business</b>	<ul style="list-style-type: none"> <li>Comprehensive service via multiple access points</li> <li>Success meeting priority of service mandates for designated targets</li> <li>Success identifying barriers for targeted populations &amp; implementing workable, measurable solutions</li> <li>Effective partner service referrals</li> <li>Knowledge of &amp; compliance with Section 188 of WIOA</li> <li>Effective use of technology solutions and other available accommodations</li> </ul>	<ul style="list-style-type: none"> <li>Continuous Review and set aside resources to evolve technology needs and access for customers</li> </ul>	No response	A universal design that addresses access points, hours, etc., to meet the needs of jobseekers and employers	1-2 and Multiple access points and hours adjusted demonstrate flexibility and creativity	1-4 and Continuous assessment is conducted to ensure the needs of specific populations are met
		<ul style="list-style-type: none"> <li>Success identifying barriers for targeted populations &amp; implementing workable, measurable solutions</li> <li>Effective partner service referrals</li> </ul>	No response	Priority of Services policy for target populations and all staff are aware and trained	Specialty services and strategies for serving targeted populations	Items 1-4 and Increase in training, job placement and retention of targeted populations
		Knowledge of & compliance with ADA	No response	Demonstrated knowledge of all requirements and plan in place for full compliance	Demonstrated knowledge of all requirements and plan in place for full compliance with dates and benchmarks	Fully Compliant

<b>Effective Leadership and Management</b>	<ul style="list-style-type: none"> <li>Local vision and plan reflect WFB plan/goals/concepts/practices</li> <li>Understands WIOA law/regulations</li> <li>Structured/comprehensive staff development</li> <li>Understands DCS/partner systems</li> </ul>	<ul style="list-style-type: none"> <li>Correctly cites and applies WIOA laws and regulations</li> <li>Biennial Certification-Meets Uniform Circular Standards-Integrity demonstrated via audits and Federal/state reviews</li> </ul>	No response	Unresolved finding(s) within the last 2 years	No unresolved findings within the last 2 years	No unresolved areas of concern or finding(s) within the last 2 years
	<ul style="list-style-type: none"> <li>Data-driven decision making</li> <li>Financial integrity</li> <li>standard operating procedures in place &amp; followed</li> <li>Leverages funding</li> <li>Utilized demand driven model</li> <li>Workable marketing plan</li> <li>Continuous improvement plan</li> </ul>	<ul style="list-style-type: none"> <li>Staff attend and complete state and locally sponsored training **</li> <li>Continuous improvement plan in place and followed</li> </ul>	No response	Continuous improvement plan with policy to complete mandatory training	Documented improvements based on continuous improvement plan. All staff have attended all mandatory training and 80% of staff have completed non-mandatory training state and/or locally developed	All staff (Partner and State) are cross-trained in fundamental Career Center operations and Partner Services
		<ul style="list-style-type: none"> <li>Outreach plan in place and followed</li> <li>Effective plan of Outreach to job seekers and business</li> </ul>	No response	Outreach plan in place and followed	Documented results from outreach. Increase in targeted customer use of Career Center.	Outreach plan demonstrates increase in job orders and placements in targeted industries that address local needs.

# Attachment C: Citrix/MOSES Fees

## Citrix/MOSES Fee Instructions

MOSES - The Department of Career Services fee to operate the Massachusetts One Stop Employment System database (MOSES)

*This is a requirement for all Career Centers. The Lowell Workforce area for FY17 is 31,003. This amount must, at a minimum be budgeted*

Citrix - Moses is access via Citrix, an internet based platform. The cost per user per month is \$3.79.

*This amount must be budgeted for all MOSES users*

Moses Reporting - The state designates 3 different profiles for MOSES reporting:

Profile 1 - Can read reports only, but can't refresh. \$16.40 per month per year

Profile 2 - Can read and also refresh reports (i.e change date parameters). \$16.98 per month per year

Profile 3 - Can create reports utilizing Crystal Reports. The cost is \$28.48 per user per month

*At a minimum, one profile 3 staff person must be budgeted.*

*It is strongly encouraged that all other Non-Profile 3 MOSES users be budgeted at a Profile 2, but should, at a minimum be budgeted at Profile 1.*