



*REQUEST FOR PROPOSALS:*  
**Job Training Services**

Funded by the  
**City of Boston**  
**Neighborhood Jobs Trust**

**Thomas M. Menino**  
**Mayor**

**Constance J. Doty**  
**Director of Jobs and Community Services**

*ISSUE DATE:* April 19, 2011  
*BIDDERS' CONFERENCE:* April 22, 2011, 10:00 a.m. Copley Library  
*LETTER OF INTENT DUE:* April 29, 2011  
*PROPOSALS DUE:* **May 24, 2011**  
**Responses must be delivered by 4:00 p.m. to**  
**43 Hawkins Street, 3<sup>rd</sup> Floor, Boston, MA**

*Inquiries:* Ken. Barnes.JCS@cityofboston.gov

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**LETTER OF INTENT TO BID**  
***NJT JOB TRAINING***  
**REQUEST FOR PROPOSALS**  
**Letter of Intent due April 29<sup>th</sup>**

This is to notify the Mayor's Office of Jobs and Community Services the following organization intends to submit a proposal in response to the NJT Job Training RFP.  
(Should you subsequently decide not to submit, please let us know.)

**Lead Organization:** \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Contact/Title: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

**Name of program:** \_\_\_\_\_

**Type of program:** \_\_\_\_\_  
\_\_\_\_\_

**Anticipated Employer partner(s) and targeted occupation(s):**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature/Title: Lead Organization \_\_\_\_\_ Date \_\_\_\_\_

**Please address correspondence to:**

Cindy Chow  
Jobs and Community Services  
Planning and Policy Development – 3B  
43 Hawkins Street  
Boston, MA 02114

## I. INTRODUCTION

The Mayor's Office of Jobs and Community Services (JCS) is the City of Boston's workforce development agency. Under the leadership of Mayor Thomas M. Menino, JCS administers funding from various sources for the purpose of supporting a broad range of workforce-related services, including job training, adult basic education and youth employment services. One such funding source is the City of Boston's **Neighborhood Jobs Trust**, which distributes linkage funds paid by developers of large-scale commercial construction projects. (See Appendix C: Guide to the Neighborhood Jobs Trust). This Request for Proposals (RFP) solicits proposals for **job training and placement** services to be funded by the Trust. The Trust is issuing this RFP through its administrative agent, the Office of Jobs and Community Services, a division of the Economic Development and Industrial Corporation (EDIC). JCS will handle all questions concerning this RFP, review all submissions, and prepare recommendations to the trustees. Selected applicants will enter into contracts with EDIC.

## II. PURPOSE OF FUNDS

Jobs linkage funding must be used to meet the employment needs of lower income adult Boston residents, defined as below 80% of median income according to the US Department of Housing and Urban Development (see Appendix B). The trustees have a further interest in meeting the needs of lower-skilled individuals with multiple barriers who may not be easily served through other workforce development initiatives such as the federally-funded training voucher system. In this RFP, the City is particularly concerned with reaching the following target populations:

- **Ex-offenders and other individuals with CORI issues;**
- **Homeless or recently-homeless individuals;**
- **TANF recipients.**

While not every individual in a training program funded under this RFP must come from one of these target populations, at least 50% of NJT-funded participants must meet one or more of these criteria. Proposals not targeting one or more of these populations will not be considered responsive to this RFP. Funded programs will be subject to close monitoring for operations in compliance with contract terms and conditions. NJT contracts are performance-based, with payments tied to meeting enrollment and job-placement goals.

Applicants should submit proposals reflecting the needs of the target population they have identified. For example, re-entry programs will need to demonstrate the involvement of committed employers willing to hire ex-offenders. If the target population lacks high school diplomas or basic English language skills, the program must integrate appropriate basic educational services of sufficient intensity to increase skill levels in a relatively short time frame. If the target population requires evening or weekend programming, applicants should design programs with hours meeting that need.

The Neighborhood Jobs Trust is required to maintain a balance between services targeted to specific communities impacted by development and services accessible to residents across the city, including neighborhoods not currently impacted by large-scale development. In reviewing proposals and making funding decisions, the trustees will be mindful of the need to maintain this balance. Please indicate, on the Proposal Cover Sheet and in the Target Population section, which neighborhoods the majority of your participants are expected to come from.

The intent of this RFP is to serve adults seeking full-time, permanent employment. The required outcome for programs funded under this RFP is full-time work at a livable wage. For certain populations, or certain occupations, part-time or temporary employment may be a strategic first step; however, applicants proposing such strategies must make a compelling argument in their favor.

### **III. ELIGIBLE APPLICANTS**

Eligible applicants include non-profit and for-profit providers of training and education services. Providers do not necessarily need to be located in Boston, but only Boston residents can be served with these funds, and accessibility for Boston residents will be a key evaluation criterion. Proposals must demonstrate capacity to provide state-of-the-art services to successfully prepare people for employment. The Trust is interested in proposals from training providers with the following competencies:

- Demonstrated ability to successfully educate, train and job-place low-income adults, including one or more of the specific target populations identified above.
- Staff expertise in providing proactive case management to support clients in overcoming barriers to training, retaining their jobs or completing a program.
- Demonstrated ability to adapt curriculum and instructional methodology to meet the needs of people with a variety of learning styles and ability levels.
- Internal monitoring capabilities which allow for program modification as needed.
- Staff experience in engaging employers and strong employer involvement in program design.
- Staffing structures which support the services proposed.

### **IV. SERVICES REQUESTED**

The Neighborhood Jobs Trust seeks proposals for programs offering job skills training leading to good jobs at livable wages. Services should include outreach and recruitment, in-depth assessment, classroom and (as appropriate) work-site instruction, case management, educational and career counseling, job placement, and post-placement services. It is anticipated that services will begin in July of 2011 and run for 12 months.

This RFP solicits programs and services targeted to individuals in need of skilled entry-level employment. This can include people who have been out of the labor force for some

time as well as individuals who are underemployed. For purposes of this RFP, underemployed can mean: those in temporary, part-time or unstable positions; those working in jobs without benefits; those whose income does not suffice to meet the needs of their families. This is a broader range of income eligibility than is typical in publicly-funded workforce development RFPs.

Accurate and timely labor market information is critical to any successful job training program; applicants are expected to present data documenting need in the field they are targeting. The Trust will consider proposals focusing on any industry sector demonstrating a reasonable expectation of jobs for program graduates. While health care has long been the largest and strongest industry sector in Boston, there are many other kinds of employers hiring entry-level workers. Ultimately, the Trust will be looking for evidence of strong employer involvement in the form of a detailed Memorandum of Agreement.

In 2009, the Office of Jobs and Community Services and the Boston Private Industry Council held a public hearing to solicit public comment on the use of workforce development funds from the American Recovery and Reinvestment Act and other sources, and on Boston's workforce development policies in general. That hearing led to a set of principles, now incorporated into this RFP, including:

- The provision of high quality workforce services leading to employment with benefits at family sustaining wages or at a minimum Boston's official Living Wage.
- Programs designed to meet the needs of special target populations with multiple barriers to employment.
- Integrated training models which incorporate adult basic education/ESOL and which connect participants to higher education.
- The use of technology in training programs to increase efficiency and effectiveness while meeting customer needs and enhancing employability.
- Investment in comprehensive assessment processes which value "customer choice" for those entering job training programs.
- Reemployment of dislocated workers and a commitment to provide training and related services to low-income adults with multiple barriers to employment.
- A dual customer approach which enhances labor market opportunities for both the job seeker and employer.

In today's economy, workers must possess a wide array of cognitive skills at a high level of mastery. Training providers face the challenge of translating this general observation into programs capable of successfully moving unemployed and underemployed Boston residents into skilled entry-level work. For example, while no one doubts the need for skilled office workers capable of using multiple software programs, the labor market now requires industry-specific knowledge and familiarity in addition to standard office skills. This RFP seeks proposals with specific employer partners invested in the proposed training program, exhibiting methods and curricula aligned with the full skill set sought by employers in the targeted field of employment. Proposals should clearly articulate the major skill competencies required by the employer partner(s).

Through this RFP, the Trust seeks to meet needs which cannot be fully met through the existing training voucher system funded by the federal Department of Labor. Programs which currently receive training vouchers should not expect to receive a group contract under this RFP simply to serve more people. We seek services which fill gaps in the current workforce development system. We also seek innovative models or approaches which respond to the needs of both job-seekers and employers in today's changing economy. The outcome of the program must be a training-related job. Described below are allowable program types:

- ❖ **Occupational skills training** provides individuals with the specific skills needed for a particular occupation. Employers are involved in the development of curricula, and typically agree to interview all graduates and hire the most appropriate. The training incorporates basic education and soft skills development to meet the needs of the target population. In-depth assessment ensures enrollees are appropriate; intensive case management supports them through the program and during the job placement phase; and retention services help ensure participants maintain employment after placement.
- ❖ **Transitional employment** models incorporate job readiness instruction, paid employment, intensive case management and job training. The employment is typically structured as a contract between the service provider and the employer, or as a social enterprise conducted by the service provider. These models are generally used for populations lacking work experience or facing other significant barriers to employment. By definition, the outcome for a transitional employment program is placement into unsubsidized permanent employment. In transitional employment models, the employer during the transitional phase is not typically the eventual permanent employer. A high degree of employer involvement is needed to ensure that participants are acquiring the skills employers need, and that employers are ultimately willing to hire the participants.
- ❖ **On The Job Training (OJT)**, like transitional employment, provides training by means of a job placement. However, in OJT, the expectation is that the employer providing the on-the-job training will ultimately hire the individual on a permanent basis. Wages during the training period are typically shared by the employer and the service provider. OJT lowers hiring and training costs for employers and opens doors for target populations in specific industries. Both OJT and transitional employment are expensive models due to the need to pay wages to participants; applicants are encouraged to secure matching funds to cover some or all of those costs. As with transitional employment, a high level of employer commitment is required.

The Trustees have not set specific cost guidelines for this RFP, recognizing costs vary according to program design and target population. However, budgets will be carefully reviewed for appropriate and justifiable costs per participant and per instructional hour. Cost will be one factor in making funding determinations; it will not be the only factor.

## **A. Required program elements**

### **1. Recruitment**

Applicants must demonstrate in their proposal an understanding of the target population they have chosen and how to engage it. Appropriate participants can be identified via the city's one-stop career centers, DTA offices, homelessness service providers, public housing developments, community based multi-service agencies, community development corporations, community health centers, neighborhood associations, faith-based organizations, regional re-entry centers and economic assistance programs. Applicants must be capable of executing a comprehensive recruitment strategy for the target population, and must show how the strategy they propose will lead to the desired level of enrollment.

### **2. Assessment**

In order to ensure participants are successful and receive appropriate services, a thorough and in-depth assessment of the prospective participant is essential. Staff expertise in areas relevant to the target population, along with employer input about industry needs, add particular value to the assessment process. Applicants should explain how they assess potential participants, and how their assessment protocol improves the service model. Intake and assessment should flow into and directly inform case management and the delivery of services. Individuals found to be unready for the program must be referred to appropriate services. Attendance and conduct policies should be discussed with the participant at the time of the initial assessment. Termination policies must be consistent, clearly defined and publicized in writing.

### **3. Case management**

A clear case management strategy for a coordinated response to participants' needs is essential to their success. This begins with the development of an individual service plan based on a thorough assessment of the individual's assets, aspirations and future plans. The plan must be jointly developed with the participant, and regularly reviewed by the service provider team and the participant. The plan should have clearly-stated education, employment and career goals, with projected start and end dates for all activities. Applicants should clearly demonstrate how case management is integrated into their service model. Effective case management assists participants in overcoming multiple barriers to success, including but not limited to scheduling difficulties, transportation problems, child care issues, and motivational concerns. Case managers monitor participant attendance and performance, problem-solving with them as necessary.

### **4. Contextual learning**

The purpose of this initiative is to prepare low-income individuals for employment. Many of those served will have very low educational levels. Programs are expected to utilize



contextual models which combine academic and technical proficiencies, developing basic skills, soft skills and job skills simultaneously. How this integration is achieved is not prescribed, but all training programs should have a basic skills component.

## **5. Employer Partnerships**

A strong employer partnership is critical in any successful training venture. In a true partnership, the training provider offers services of genuine value to the employer. Training providers should be able to reduce hiring and training costs for their employer partners and eliminate some of the risk employers assume in hiring decisions. In return, effective employer partnerships add real value to a training program. Employers should be involved in the tailoring of training designs to meet industry needs and standards. Employers can also guarantee interviews for graduates, and help training providers and participants understand their industry's HR practices. Training providers must have a Memorandum of Agreement with at least one employer. Given the instability of the economy, applicants are encouraged to engage more than one employer.

## **V. PERFORMANCE STANDARDS**

In addition to the academic and vocational goals outlined in your proposal, programs will be expected to achieve positive outcomes for at least 60% of those enrolled in the program, defined as placement into a training-related job at an average wage of at least \$13 per hour, with 30-day retention. If, because of your target population, you anticipate placement rates or wages below these levels, you must provide a clear and compelling explanation as to why these performance standards should not apply to your program.

## **VI. PROGRAM MONITORING/REPORTING/BILLING**

JCS will conduct site visits to monitor compliance and quality of services. This includes:

- Achievement of objectives in accordance with proposal and contract;
- Integrity of administrative systems and eligibility determination; and
- Quality assessment through observation and informal interviews.

These monitoring activities may take the form of administrative record reviews, interviews of staff and/or participants, and general observations of the facilities and operations. Participants not adequately documented as NJT-eligible will not count towards your outcome measure. Participant files must contain the following:

1. copy of the participant's intake form and all eligibility documents
2. appropriate working papers (e.g. work permit)
3. all assessments

4. record of attendance and documentation of activities where appropriate (workshop or activity attendance record, etc.)

JCS uses the state Division of Career Services MOSES database for its NJT contracts. The MOSES database will be used for contractors to enter data, update client progress, report outcomes, run reports, and any other aspects of our MIS needs. Agency staff will be trained in MOSES and certified by DCS in order to access the database.

Contracting agencies must be capable of accessing the Internet with a computer capable of displaying data 800x600. Communication speed must be equal to or better than a DSL link. JCS will provide the necessary software to effect the hookup through JCS to the state system. Each funded organization is also expected to provide its own anti-virus protection.

Applicants must demonstrate the capacity to perform administrative responsibilities including: maintaining records of participant eligibility, attendance and progress; managing a participant tracking system in compliance with the MOSES management information system; and submitting program reports and invoices at regular intervals.

NJT grantees are expected to participate in the Supplemental Nutrition Assistance Program Employment and Training program (SNAP E&T) of the Department of Transitional Assistance (DTA). The NJT receives partial reimbursement from SNAP E&T for certain NJT participants who are receiving SNAP benefits during the training. These funds are put back into the Trust to fund future training programs. Skills training providers are expected to make referrals to DTA's SNAP program, keep SNAP enrollment documents on file, and inform JCS of participants' SNAP status.

## **VII. TERMS OF PROCUREMENT**

Responses to this RFP must be received by JCS **no later than 4:00 p.m. on May 24, 2011**. JCS is located at 43 Hawkins Street, Boston, 02114. Late proposals will not be accepted. Faxed or e-mailed applications will not be considered. We strongly encourage applicants to deliver their proposals in person. Submit one signed original and five copies of your proposal. Attach a copy of your most recent agency audit to the signed original only.

A **letter of intent** (see page 3 of this RFP) should be submitted by April 29th, 2011. JCS may ask applicants to submit written clarifications to their proposals, and may conduct site visits during the procurement process. **A bidders' conference will be held on April 22nd in the Rabb Lecture Hall of the Copley Library (700 Boylston Street). Potential applicants are strongly encouraged to attend.**

Proposals will be evaluated on the basis of the quality of the proposal, congruence with the goals of this RFP, past program performance, geographic distribution of services, and service to target populations. The narrative portion of the proposal must be **no more than**

**ten pages**, single-spaced, in 12-point font. Point values are allocated to each section of the proposal narrative as follows:

Organizational Capacity:	15 points
Understanding of Target Population:	10 points
Program Design:	50 points
Staffing and Administration:	10 points
Budget and Budget narrative: (not counted in 10-page limit)	15 points

These values are an evaluation tool; they do not dictate which proposals are ultimately recommended for funding. JCS reserves the right to reject any and all proposals, to waive or modify any requirement contained in this RFP, to amend without consult any proposal, and to effect any agreement deemed be in the best interest of the city and its residents.

Contracts will be for a 12-month period. In issuing contracts, JCS makes no commitment for refunding, but reserves the right to refund programs based on the availability of funding, program performance, organizational capacity, administrative responsiveness, and service to target populations. JCS also reserves the right to use the results of this procurement process to make funding recommendations for other funding sources.

Contracts will be performance-based, with payments contingent upon enrollments and job placements. Given the performance standards outlined in this RFP, the Trust expects each vendor to place at least 60% of all enrollees in training-related jobs. Specific payment terms will be negotiated with successful applicants, based on the overall costs of the program and the amount of award. The Trust and JCS will ensure all costs are necessary and reasonable in approving awards and negotiating final terms.

All questions regarding this RFP should go to [ken.barnes.jcs@cityofboston.gov](mailto:ken.barnes.jcs@cityofboston.gov)

## **VIII. PROPOSAL SPECIFICATIONS**

The original (signed) proposal must be submitted along with 5 copies. Applicants are responsible for ensuring that all copies are complete. Only the original need contain your agency's audit and/or financial statement. The proposal narrative must be single-spaced in 12-point font. The narrative may not exceed 10 pages. This page limit does not include the one-page program summary, the budget, the budget narrative, or any required forms or attachments. The narrative should follow the order and format of the Proposal Guidelines section, which begins on the following page. Proposals must be delivered no later than **4 PM on May 24<sup>th</sup>** to:

**Office of Jobs and Community Services  
Planning Department  
43 Hawkins Street, Boston, MA 02114**

The office is located near City Hall, behind the Area A police station and the Channel 7 building. It is within walking distance of the Government Center and Bowdoin subway

stations. Parking in the vicinity of the office is limited. Allow extra time if you are driving.

### **Proposal Contents List**

Your proposal should contain the following items, in this order:

1. Proposal Cover Sheet (see appendix)
2. One Page Program Summary
3. Proposal Narrative (10 pages max.)
4. Budget
5. Budget Narrative
6. Memoranda of Agreement with Employer(s)
7. Syllabus and/or Curriculum outline
8. Daily or Weekly Program schedule
9. Job descriptions and resumes
10. Any other requested attachments

## **IX. PROPOSAL GUIDELINES**

### **1. One-Page Program Summary**

On one side of one piece of paper, briefly describe your proposed program, including specific target population, number of participants, program site(s), start and end dates, industry/employers and positions to be trained for, educational and employment outcomes, and other key features such as support services, internships, etc. Identify any partners with whom you will collaborate to offer key components of the design. This page does not count toward the 10-page limit.

### **2. Organizational Capacity**

Briefly describe your organization's work over the past two years involving low-income or unemployed populations. Describe your experience and expertise in the following areas:

- Occupational skills training
- Job development and placement
- Counseling, case management, and post-placement services

Provide performance outcomes (enrollments and training-related job placements) for these services. Please provide a reference EDIC can contact regarding your organization's administrative capabilities.

### **3. Understanding of Target Population**

Please describe the characteristics and needs of the specific population you intend to serve, assuming the reader is unfamiliar with the population. What are the challenges and opportunities for these individuals? How does this population differ from the general population? What direct experience have you had with members of this population and how did you accommodate their needs? Which aspects of your program are designed specifically to address the challenges faced by this population? If not everyone in your program will be from this target population (e.g. if you anticipate serving 60% ex-offenders and 40% others), describe who the rest of the participants will be. Some members of your target population are likely to have disabilities; how will you accommodate persons with disabilities? Show evidence that there are sufficient numbers of people who would be interested in and ready for your program.

#### **4. Program Design**

Describe in detail your proposed design for offering each of the following required components: recruitment, assessment, case management, job training, employer involvement and job placement. Explain how these functions, as designed, are appropriate for your target population and its needs.

##### **A. Recruitment:**

Discuss your plan for recruitment, including the specific target group you will recruit, the neighborhoods they live in, the organizations and audiences with which you will communicate, and the tools and methods you will use. List by name any Boston Housing Authority developments you will recruit from, and how you will do so. How large a pool of recruits will you need to bring into your intake process in order to identify the cohort of enrolled participants you propose to serve?

##### **B. Assessment:**

Describe the initial assessment process you will use to determine individuals' academic and vocational needs and to develop an individual learning plan for each participant. Identify the specific skills assessed and the tools used. What makes a candidate appropriate for the proposed training? Discuss the entry requirements (math and/or reading levels, etc.). Describe how you will work with the individual to reach agreement on the plan and make modifications as necessary. How will NJT eligibility be determined? What happens to individuals who are deemed to be unready or ineligible for your program? How will you know if your participants are attaining the appropriate competencies?

##### **C. Case Management**

Discuss your organization's case management system, including the range of services participants will receive through case management, and how you will maintain a strong, effective presence for participants during the assessment, training and follow-up periods. Who will provide case management? How often? What system do you use for documenting, tracking and sharing case management information?

##### **D. Job Training:**

Describe your job training program. Discuss your goals, objectives and methods for instruction in occupational training. List the competencies that your trainees will master. Attach a syllabus or curriculum outline for each instructional component, sample lesson plans, and a daily or weekly schedule of program activities. Please explain your approach to the integration of basic skills, computer skills, soft skills and vocational skills. Use examples from your curriculum to illustrate how students will learn or strengthen cognitive and technical skills in context. If you are proposing a

transitional employment or OJT approach, explain how the paid employment portion of the service model is integrated with your other service elements (assessment, case management, skills training). How will participants transition into the paid experience? What is the training plan for participants during OJT or transitional employment?

E. Employer Involvement and Job Placement:

List the employers you are targeting for placement of your graduates. Identify the specific job titles (with wages) for which your participants will be competing, with a brief description of each job. Cite appropriate labor market information supporting your choice of targeted occupations. Discuss how you will prepare trainees for on-line job search and on-line applications. Provide a timeline for the process and timing of your job development, placement and retention activities. Discuss in detail the ways in which your partnerships with employers will contribute to the success of your training, job development, placement and retention efforts. Clearly define the roles and activities of the participating employer(s). Discuss the ways in which employer involvement has contributed to your curriculum and design to make them more closely linked to the skills required by the industry and job(s) for which you are training. Attach a Memorandum of Agreement (MOA) between your organization and the participating employer(s) outlining the activities, responsibilities and contributions of the employer(s). The MOA must be signed by the CEO of each organization or a designee who has the most senior operational authority for the area of employment covered by the program.

## 5. Staffing and administration

Please identify by name the staff members responsible for this program, briefly describing their experience and qualifications. Identify the staff who will manage the participant tracking system. Attach job descriptions and resumes for all positions involved in the project, noting whether they are to be funded or provided in-kind. Identify which staff and/or functions are direct service and which are administrative. Label the job descriptions with the name of the staff person, or indicate if the position is vacant.

## 6. Budget

1. **Budget forms:** Using your own format, prepare a detailed 12-month budget to cover all aspects of the project. Include costs for all functions (recruitment, assessment, classroom instruction, other instructional components as appropriate, case management, job development and placement, client tracking, project oversight and administration, fiscal management and oversight, and reporting).

2. **Budget narrative:** Prepare a budget narrative describing every line item and identifying clearly how each has been calculated.

**SECTION X: APPENDICES**

**Appendix A: Proposal Cover Sheet**

**Appendix B: Participant Income Eligibility Guidelines**

**Appendix C: Guide to The Neighborhood Jobs Trust**

**Appendix D: Boston Career Centers List**



**Proposal Cover Sheet**  
**NJT Job Training Services**  
*(Please type or print)*

**Name of Organization:** \_\_\_\_\_

**Name of Program:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Executive Director's signature:** \_\_\_\_\_

**Proposal Contact Person:**

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_

**Fax:** \_\_\_\_\_

**E-mail:** \_\_\_\_\_

**Amount Requested:** \$ \_\_\_\_\_ **Number to be served:** \_\_\_\_\_

**Neighborhood(s) majority of participants will come from:**

\_\_\_\_\_  
\_\_\_\_\_

**Proposed site of service delivery:** \_\_\_\_\_

**Employer partner(s):** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

## Appendix B

### **PARTICIPANT INCOME ELIGIBILITY STANDARDS**

Program participants must meet HUD “moderate income” standards. Shown below are the current standards:

<b>Household Size</b>	<b>HUD “Moderate Income” Standard (aka 80% of median)</b>
1 person	\$45,100
2 persons	\$51,550
3 persons	\$58,000
4 persons	\$64,400
5 persons	\$69,600
6 persons	\$74,750
7 persons	\$79,900
8 persons or more	\$85,050

## **Appendix C**

### **Guide to the Neighborhood Jobs Trust**

#### **What is the Neighborhood Jobs Trust?**

The Neighborhood Jobs Trust (the “Trust”) is a Massachusetts public charitable trust created under the authority of Chapter 371 of the Acts of 1987 and the laws of the Commonwealth of Massachusetts, and is administered by the Collector-Treasurer of the City of Boston, Massachusetts (the “City”) as managing trustee pursuant to Chapter 11 of the ordinance approved by the City Council on August 12, 1987 and the Mayor of Boston on September 8, 1987, and pursuant to a declaration of trust dated October 5, 1987. The purpose of the Trust is to ensure that large-scale real estate development in Boston brings a direct benefit to Boston neighborhood residents in the form of jobs, job training and related services.

The Trust is managed by three Trustees: a member of the City Council appointed by the Mayor; the Director of the Office of Jobs and Community Services; and the Collector-Treasurer of the City of Boston, who serves as a managing trustee. Administrative management of Trust funds is provided by the City of Boston’s Office of Jobs and Community Services (OJCS).

Funds in the Trust come from *jobs linkage* fees. The Zoning law of the City of Boston requires that commercial construction projects in excess of 100,000 square feet receive a zoning variance, one condition of which is that the developer of the building is obligated to pay a linkage fee, based on square footage, to the Neighborhood Jobs Trust. Developers have two options for this:

- Job Contribution Grant – the developer may simply make the payment to the Trust, to be administered in its entirety by the Trustees in accordance with established regulations and policies.
- Jobs Creation Contribution – upon making payment to the Trust, the developer may request that linkage funds be used to create a job training program for workers who will be employed, on a permanent basis, at the development project.

#### **What activities does the Trust support?**

The Trust was created to mitigate the extent to which Boston’s low or moderate income residents lose employment opportunities, have their existing employment or promotional opportunities diminished, or are unable to successfully compete for new employment opportunities resulting from the construction or rehabilitation of new large-scale real estate development projects in the City of Boston. To protect and provide continued and future employment opportunities for Boston’s low or moderate income residents, the Trust supports such services as job training and retraining, employment counseling and job placement services, adult literacy and alternative education programs, and related supportive services.

The zoning code requires that at least twenty percent (20%) of any jobs linkage payment be reserved for appropriate services to the neighborhood or neighborhoods where (or adjacent to

where) the project is located. These neighborhoods are defined for each project in the development plan approved by the Boston Redevelopment Authority.

Trustees establish programmatic priorities and guidelines to ensure that funds are used to support activities that are consistent with the intent of the Trust, and that reflect the needs and requirements of the labor market at the time the programs are implemented.

All individuals enrolled in Trust-supported programs must be City of Boston residents of low or moderate income as defined by annual federal guidelines.

### **How does the developer make the jobs linkage payment?**

The developer must first choose between a Jobs Contribution Grant and a Jobs Creation Contribution.

**Jobs Contribution Grants** are due in two equal payments, the first of which must be made to the managing trustee (Collector Treasurer of the City of Boston) prior to the issuance of a building permit. The managing trustee will present a letter to the developer acknowledging receipt of the payment, and a copy of this letter will be sent to the Inspectional Services Department as evidence of payment. The second payment is due within twelve months.

**The Jobs Creation Contribution** option is for use only in the creation of programs to train workers for permanent jobs with the development project itself, and must be approved in advance by the Trustees. The developer must notify Trustees at least sixty (60) days in advance of the date the first linkage payment is due, and must also meet with staff of the Office of Jobs and Community Services prior to the linkage payment date. The developer makes the payment to the Trust, to be held until approval of the Trustees is obtained for the program. The developer must prepare a program proposal to the Neighborhood Jobs Trust upon notification that the Jobs Creation Contribution option has been selected. In accordance with policy set by the Trustees, the total program cost may not exceed 75% of the full jobs linkage payment due for the project. The selection of job training providers or other service providers must be conducted in accordance with Trust guidelines for fair and open procurement.

In no case may the developer make public commitments about the distribution of jobs linkage funds without prior approval of the Trustees.

## **How does the developer determine whether to choose the Jobs Contribution Grant or Jobs Creation Contribution option?**

The decision should be made after consultation with the stakeholders – the development team, the Trust and its staff, potential employers, residents and service providers within an impacted community, and any additional advisors the developer has engaged in its planning process.

The Trustees will consider the merits of the developer's proposed program in the context of the City's existing job training and placement system. Since any approved program will be implemented through a contract between the Trust, the developer and a service provider, the developer should consider the programmatic and administrative responsibilities of running a training program.

## **How will Jobs Creation Proposals be evaluated?**

Trustees will use the following criteria to evaluate Jobs Creation Proposals:

- An analysis by the developer of the employer(s), type(s) of jobs, number of positions, and placement wages for the positions for which training will be provided.
- Demonstration of commitment by the employer(s) to hire qualified trainees.
- Appropriateness of training to local residents' needs and abilities.
- Capacity, directly or through established links with training providers, to provide effective outreach and recruitment, assessment, training and placement services to program participants.
- Appropriateness of costs.

Additionally, all proposals will be compared with existing education, training and related supportive services which may be purchased with linkage dollars, using criteria which include overall project cost, cost per participant, appropriateness of target population, quality and quantity of outcomes, and consistency with established Trust priorities.

## **How does the Trust distribute Jobs Contribution Grants?**

Each year, Trustees consider the amount of available funding in the Trust, programmatic priorities based on residents' needs, labor market conditions, and the availability of other financial resources and services in the city. If sufficient funds are available, Trustees will solicit proposals using a competitive Request for Concept Papers or Request for Proposals.

Funding requests are evaluated by the Trustees, with staff support from the Office of Jobs and Community Services, on the basis of demonstrated need, effectiveness of approach, and cost effectiveness.

Trustees may also elect to conduct selected review and refunding of one or more programs previously supported by the Neighborhood Jobs Trust. However, it should be noted that the

Neighborhood Jobs Trust is not intended to provide long-term institutional support to programs given the unpredictable nature of its revenue stream. Applicants should consider Trust funds as start-up or seed money to launch innovative projects that will either be time-limited or will secure alternative long-term support.

Non-profit and for-profit education and training organizations, institutions of higher learning, churches, and employers are eligible to apply for Neighborhood Jobs Trust funds.

Program performance will be evaluated on the basis of successful enrollment, retention and placement as defined in the approved proposal, and in accordance with any other criteria established by the Trustees.

### **FOR MORE INFORMATION**

More information on the Neighborhood Jobs Trust is available from:

**Ken Barnes  
Planning Department  
Office of Jobs and Community Services  
43 Hawkins Street  
Boston, MA 02114**

[Ken.barnes.jcs@ci.boston.ma.us](mailto:Ken.barnes.jcs@ci.boston.ma.us)

Linkage payments should be remitted to:

**Neighborhood Jobs Trust  
c/o City of Boston Collector-Treasurer  
City of Boston Treasury Department  
City Hall Room M-35  
One City Hall Square  
Boston, MA 02201  
Tel: (617) 635-4140  
Fax: (617) 635-4142**

## **Appendix D: Boston One-Stop Career Centers**

### **Boston Career Link**

1010 Harrison Ave.  
Boston, MA 02115  
Phone (617) 536-1888  
Fax (617) 536-1987

### **JobNet**

210 South Street  
Boston, MA 02111  
Phone (617) 338-0809  
Fax (617) 338-2050

### **The Workplace**

29 Winter Street, 4th Floor  
Boston, MA 02108  
Phone (617) 737-0093  
Fax (617) 428-0380