

The Commonwealth of Massachusetts
EXECUTIVE OFFICE OF HOUSING AND ECONOMIC DEVELOPMENT
One Ashburton Place | Room 2101 | Boston, MA 02108



Request for Proposals (RFP)
Advanced Manufacturing Training Program
Fiscal Year 2019

1. INTRODUCTION

Consistent with the goals and philosophy of Governor Baker's Workforce Skills Cabinet, the Executive Office of Housing and Economic Development along with the Executive Office of Labor and Workforce Development, and the Executive Office of Education are soliciting applications from a qualifying consortium that provides workforce development services in advanced manufacturing, such as recruitment, job training, placement activities, and supportive services.

This program is aligned with the Baker-Polito Administration's new regional planning initiative aimed at addressing the skills gap by bringing together regional teams of educators, workforce, and economic development professionals to create regional blueprints for growth strategies in every region of the Commonwealth. This initiative is led by the Governor's Workforce Skills Cabinet, which works to align state and local programs, policies, and resources to fuel job growth and address employer demand for talent. For more information: www.mass.gov/regional-workforce-skills-planning-initiative

As part of this planning process, regional teams across the regions have devised local strategies for regional labor market blueprints used to inform policy-making and investments targeted at strengthening the Massachusetts economy. Many of the regional blueprints focused on the area of advanced manufacturing. For the purposes of this RFP, the regions will join into four collaborating consortia hubs: Central, Northeast (including Northeast and Greater Boston), Southeast (including Southeast and the Cape & Islands), and West (including Berkshire and Pioneer Valley).

The goal of the Advanced Manufacturing Training Program is to develop a fully coordinated manufacturing training system across the state. The program acknowledges the need for the deployment of the system on a regional basis while leveraging expertise, resources, and collaboration opportunities to ensure the regional nuances of the manufacturing systems are utilized to their full capacity. Therefore the system will be deployed within the collaborating consortia hub regions noted above.

2. RFP SCOPE AND DESCRIPTION

2.1 Procurement Scope and Description

Within the limits of available appropriations, the Executive Office of Housing and Economic Development shall make grants not to exceed \$625,000 each to consortia to provide workforce development services to programs and resources to address employer demand for talent.

A qualifying consortium shall develop, coordinate, and maintain a coherent manufacturing workforce development system (youth and adult talent pipelines) that fills the needs of employers for a skilled workforce.

2.2 Applications for Advanced Manufacturing Program funding must include:

2.2.1 Consortia Hub Region

2.2.2 An Application Lead

- Name, consortium entity type, description, website, mailing address, point of contact details, entity's legal name and address (if different), Tax Identification Number, Vendor Code, Authorized Signatory Title and Name
- *Required attachment:* most recent audited financials of lead applicant

2.2.3 Consortium Partners by Entity Type

- Partners names, description, involvement in Five Year Plan (if plan includes funding for entity, indicate amount and purpose), involvement in Regional Planning Team, website, mailing address, entity's legal name and address (if different), Tax Identification Number
- *Required attachment:* Letters from all consortium partners listed within the application, signed by the consortium partner's authorized person saved as one PDF file. (name file: Lead Applicant Name - Partner Letters)

2.2.4 Current Manufacturing System and Plan Development Overview

- Details about the region's present manufacturing system including: past and current trends, challenges, and demands; recruitment, training/programming, retention and placement activities, supportive services, and other related strategies.
- Verification that in the process of determining manufacturing talent needs in the region that the applicant consulted available labor market supply and demand data from the regional blueprint and other sources on worker skills gap shortages and conferred with employers in its region.

2.2.5 Five Year Manufacturing Training Plan Recruitment, Training, Placement Details

- Details regarding new strategies and/or alignment of resources for the general population and targeted population that expand talent pipelines for recruitment, training/programming, retention and placement activities, aligned with or reflecting strategies articulated in the Regional Labor Market Blueprints.
- Specific or measurable outcomes and timelines for achieving outcomes. Including: identification of programs, credentials, and special population considerations, aligned with or reflecting outcomes articulated in Regional Labor Market Blueprints.
- Strategies to improve connectedness between employers, secondary and post-secondary education/workforce systems and the manufacturing workforce in its region, aligned with or reflecting strategies articulated in the Regional Labor Market Blueprints.
- Budget that aligns with consortium's Five Year Manufacturing Training Plan

2.2.6 Plan Implementation and Review

- Methods and timelines by which the consortium partners will meet to review progress towards shared goals as well as reevaluating and adopting new strategies as needed
- Aligns with or reflects the "Continuous Communication and Shared Accountability" section of Regional Market Blueprints.

2.3 Number of Awards

Multiple, one per geographic consortia hub region

2.4 Geographic Regions

Consortia are aligned to the WIAO regions of the Governor's Workforce Schools Cabinet Regional Planning Initiative. For more information: www.mass.gov/regional-workforce-skills-planning-initiative. The following four consortia hubs will be the focus of this grant program:

- West (including Berkshire and Pioneer Valley)
- Central (including Central)
- Northeast (including Northeast and Greater Boston)
- Southeast (Including Southeast and Cape)

2.5 Eligible Entities

A consortium, a college program of service that includes career centers, community based organizations, community colleges or institutions of higher education, local or regional employers, manufacturing associations, vocational technical schools, workforce investment boards, and or other partners that provide workforce development services, such as job skills training, education, placement services, and supportive services.

2.6 Acquisition Method and Estimated Value of the Contract

Fee for service with applications for up to \$625,000 will be accepted.

Payment schedule will be negotiated as part of contracting.

2.7 Funding Source

Fiscal Year 2019 Budget, Account 7002-0020, Workforce Development Grant: *For a precision manufacturing program administered by the executive office of housing and economic development that provides training to unemployed and underemployed individuals, including veterans; provided further, that not less than \$90,000 shall be expended for the E-Team Machinist program in the city of Lynn; and provided further, that not less than \$100,000 shall be expended for the Middle Skills Manufacturing Initiative in the counties of Hampshire and Franklin.*

2.8 Contract Duration

The expected duration of this contract is as follows:

Initial Duration: Approval Date - To: June 30, 2019

Renewal Option: Yes

Number of Renewals: 4

3. STATEMENT OF WORK REQUIREMENTS

The implementation of the consortium's Five Year Regional Manufacturing Training Plan that optimizes regional training capacity and aligns state and local programs, policies, and resources to fuel job growth and address employer demand for manufacturing talent. The Five Year Regional manufacturing Training Plan should reflect and be aligned to the submitting entities' approved Regional Labor Market Blueprints.

3.1 Plan and Implementation Considerations

3.1.1 Consortium Information

- Who will provide workforce development services, their role, and scope of work to include: primary industry; community; education/training; workforce partners

3.1.2 Regional Workforce Plan Overview

- Regional Planning Process
- Plan's Alignment to Region's Regional Workforce Skills Blueprint
- Specific occupations in manufacturing that are in high demand within the consortium's selected region, noting the source of information
- Identification of current secondary and post-secondary education and training programs, their instructional capabilities, and capacity constraint considerations
- Population (s) that will be targeted

3.1.3 Five Year Manufacturing Training Plan: Recruitment, Retainment, Training and Placement

- Strategies for reaching target populations while ensuring equitable access to programs
- Recruitment and assessment strategies that are likely to be successful based on experience and history of outcomes including meeting employer needs
- The process and number of individuals the applicant proposes to recruit
- Description of proposed services and why they are important strategies for increasing the number of workers along multiple entry points to career pathway opportunities in the occupations identified in the overview, and outlines why the proposed services will prepare the trainees for employment. Including:
 - Details regarding training of unemployed and underemployed individuals, and underrepresented populations including: veterans; minorities; women
 - Specific skills such as technical, non-technical, and work readiness that new and incumbent workers will attain as a result of the program
 - Identification of how resources funded by the Advanced Manufacturing Training Program align and compliment or leverage other state, federal, industry, or private sector training and education resources
 - How outlined program and activities will increase the output of manufacturing talent in the region
- Projected number of individuals projected to be trained
- Projected number of incumbent workers to be trained, and the number of individuals who will advance in employment level
- Describes how the consortium will engage businesses to implement the plan, including the form (s) of engagement the consortium will deploy, including the format (s) it will use to:
 - Assist with pairing trainees with companies for work-based learning experiences
 - Help manufacturers find high quality workers for full-time employment
- Target number of businesses (by industry business associates with) that will be engaged, and actual number engaged
- Target number of incumbent trainees who will advance in employment level, and actual number who advanced in employment level

- Target number of individuals to be placed in full-time employment, and actual number placed

3.2 Budget

Compensation will be based solely on the budget supplied by the applicant and accepted by the Executive Office of Housing and Economic Development, and incorporated into the Standard Contract and Attachment A. Budget must contain all goods and services to be provided on this Statewide Contract.

4. EVALUATION CRITERIA

The Workforce Skills Cabinet will review applications based on the following criteria:

4.1 Strength of Consortium

- Evidence of strong relationship between consortium partners
- Specific names, relationship, and role (s) in plan clearly defined
- Letters from all consortium partners listed within the application, signed by the consortium partner's authorized person
- Partners are part of region's planning team -or- commit to being part of the region's planning team in the future

4.2 Appropriateness of Five Year Plan

- Plan aligns with Regional Labor Market Blueprint, and specifically articulates strategies, outcomes, and continuous communication/shared accountability activities
- Plan identifies and targets specific occupations in manufacturing that are in high demand
- Plan describes a realistic recruitment and assessment strategy that is likely to be successful based on experiences, history of outcomes and meeting employer needs
- Plan has a clear strategy for reaching target populations
- Plan provides a strong description of the proposed training and/or services, and describes why these services are an appropriate strategy for increasing the number of workers along multiple entry points to career pathway opportunities, retaining manufacturing talent and helping companies find high quality workers
- Plan demonstrates that the proposed services will prepare the trainees for employment;
- Plan activities build on successful outcomes from existing training and employer engagement strategies
- Plan includes strong manufacturer and business engagement, and plans for expanding the number of employer partners and their participation in training programs
- Plan compliments and leverages institutional capacity, assets and leadership of secondary and post-secondary education, career centers, and workforce partners

4.3 Increased Capacities

- Includes training of underemployed and unemployed and underemployed individuals, and underrepresented populations including: veterans; minorities; women
- Activities directly correlate to training and employment outcomes for the target region, and there is a solid path to increase the output of manufacturing talent in the region
- The number of individuals the applicant is proposing to recruit, train, and place in employment and advance in employment level is realistic, and will create a degree of impact for the workforce supply. The degree of impact for employer engagement and partnership will lead to meeting regional targets for workforce demand

- Proposed enrollments and outcomes are consistent with the consortium partners' historic placement rate for similar training programs, and the plan for increased enrollments is achievable.
- Demonstration of and or a history of successfully demonstrating that trainee graduates will be placed in employment

4.4 Use of Funds

- Budget aligns with the proposed plan design
- The breakdown among budget activity amounts (recruitment, training, placement) is reasonable to achieve the plan
- Proposed number of individuals recruited, enrolled, trained, and placed, are appropriate given expenses outlined within the budget

4.5 General

- The Massachusetts Executive Office of Housing and Economic Development reserves the right to reject any and all applications
- A response which fails to meet any material term or condition of the RFP, including the submission of required attachments, may lose points or deemed unresponsive and disqualified
- The Massachusetts Executive Office of Housing and Economic Development will award contracts based on the quality of the application and acceptability of the quotation for services
- The Massachusetts Executive Office of Housing and Economic Development may request a phone interview prior to entering into a contractual agreement
- The Massachusetts Executive Office of Housing and Economic Development may request an applicant to modify specific aspects of their application prior to being offered a contract

5. REPORTING

The consortium will report annually on the outcomes of activities funded by the Advanced Manufacturing Training Program, including: number of trainees recruited; number of individuals who entered training; number of individuals who completed training; number of individuals placed in full-time employment; number of incumbent workers trained that improved level of employment,; number of businesses engaged. The report shall also include all activities and programs related to manufacturing training in its region, the capacity of the training programs, and the alignment of the activities and programs.

6. ESTIMATED PROCUREMENT CALENDAR AND RELATED TERMS

6.1 Estimated Procurement Calendar

| Item | Date |
|---|--------------------------|
| RFP Issued | August 22, 2018 |
| Intent to Apply If entity plans to apply, please send an email with intent to apply to: Helena.Fruscio@mass.gov | August 31, 2018 |
| Deadline for Submission of RFP Questions Written questions can be submitted to the Executive Office of Housing and Economic Development by sending an email to: Helena.Fruscio@mass.gov , with the subject line: “Advanced Manufacturing Training RFP Question” *other related Q&A terms in Section 6.2 | August 31, 2018, 5:00 pm |

| | |
|---|-----------------------------|
| Official Answers for RFP Q&A published (estimated) | September 12, 2018, 5:00 pm |
| RFP Amendment Deadline | September 12, 2018, 5:00 pm |
| Online Application Window Opens | September 12, 2018, 5:00 pm |
| Deadline for Applications | September 24, 2018, 5:00 pm |
| Applicant Interviews Application's Point of Contact should hold these dates on their calendar. If there are follow-up questions about the application, there will be a phone interview during this timeframe. | October 9-12, 2018 |
| Notification of Apparent Successful Applications | November 2018 |
| Estimated Contract Start Date | December 2018 |

6.2 Submission of RFP Questions

- Entities can submit written questions from the Executive Office of Housing and Economic Development by sending an email to: Helena.Fruscio@mass.gov, with the subject line: "Advanced Manufacturing Training RFP Question"
- The Executive Department of Housing and Economic Development reserves the right not to respond to questions submitted after the deadline specified within the Procurement Calendar located within 6.1
- It is the Applicant's responsibility to verify receipt of submitted questions
- Applicants are responsible for submitting questions with content suitable for public viewing, since all the questions are accessible to the public. Submitted questions must not include any information that could be considered personal, security sensitive, inflammatory, incorrect, collusory, or otherwise objectionable, including information about the Applicant's company or other companies
- The Executive Office of Housing and Economic Development reserves the right to edit or delete any submitted questions that raise any of these issues, or that are not in the best interest of the Commonwealth or this RFP
- All answers to questions submitted shall be considered final when posted. Any subsequent revisions to previously provided answers will be dated. Answers to submitted questions will be posted on the Advanced Manufacturing Training Program page on mass.gov/hed

6.3 RFP Amendment Deadline

The Executive Office of Housing and Economic Development reserves the right to make amendments to the RFP after initial publication. It is each Applicant's responsibility to check on the Advanced Manufacturing program page on mass.gov/hed for any amendments, addenda or modifications to this RFP, and any RFP Q&A records related to this RFP.

7. OTHER TERMS

7.1 The Massachusetts Executive Office of Housing and Economic Development complies with all Commonwealth of Massachusetts' procurement laws and regulations set forth and overseen by the Commonwealth's Operational Services Division when awarding contracts as well as the state's award requirements as mandated and overseen by the Office of the State Comptroller when dispersing these funds.

7.2 Successful applicants, upon notification of contract award, will be required to enroll in EFT as a contract requirement by completing and submitting the Authorization for Electronic Funds Payment Form to the

Executive Office of Housing and Economic Development for review, approval and forwarding to the Office of the Comptroller. If the applicant is already enrolled in the program, it may so indicate in its response. Because the Authorization for Electronic Funds Payment Form contains banking information, this form, and all information contained on this form, shall not be considered a public record and shall not be subject to public disclosure through a public records request.

7.3 All responses and information submitted in response to this RFP are subject to the Massachusetts Public Records Law, M.G.L. c.66, s.1-, and to c.4, s.7, ss.26.

7.4 If during the term of this Agreement and for a period of six years thereafter, the Executive Office of Housing and Economic Development is audited, the grantee must make all records relating to this grant available to auditors.

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Advanced Manufacturing Training Program
Fiscal Year 2019 Application Questions

The Fiscal Year 2019 Advanced Manufacturing Training Program application must be completed online. The link to the online application will be posted on September 12 by 5:00pm.

**Applications will be accepted from
September 12, 2018, 5:00pm until September 24, 2018, 5:00pm.**

* notates required question

Required Application Attachments: 1) Audited Financials of Lead Applicant; 2) Signed Letters from authorized person of All Consortium partners; 3) Budget and Trainings in Region Excel

Section 1

Consortia Hub Region & Application Lead

Consortia Hub Region

- Select: Central, Northeast, Southeast, West

Consortium Lead

- Consortium Lead Name*
- Consortium Lead Entity Type* (from RFP section ____)
- Entity Description*
- Entity's Mailing Address* (#, Street Name, Street Ending, Unit, City/Town, Zip Code)
- Entity's Website*
- Entity's Point of Contact* (Title, First Name, Last Name, Email Address, Phone)
- Entity's Legal Name (d/b/a or ____)
- Tax Identification Number* (from W9)
- Vendor Code* (12 characters)
- Authorized Signatory Information* (Title, First Name, Last Name)
- *Required Attachment**: Consortium's Lead's most recent audited financials*
File saved as: Lead Applicant Name - Audited Financials

Sections 2-9

Consortium Partners by Type

There is one page for each type of partner, with space to enter multiple for the entity type.

Pages are in the following order: Section 2: Career Centers; Section 3: Community Based Organizations; Section 4: Community Colleges and Institutes of Higher Education; Section 5: Local and Regional Employers; Section 6: Manufacturing Associations; Section 7: Vocational Technical Schools; Section 8: Workforce Investment Boards; Section 9: Other Partners that provide workforce development services, such as job skills training, education, placement services, and supportive services

Partner Information

- Entity Name
- Entity Description
- Entity's Website
- Is the entity part of the region's planning team, or does it commit to being part of the region's planning team in the future? (*select: yes -or- no, but commits to in the future*)
- Area (s) of Involvement in Plan (*check all that apply Recruitment, Training, Placement*)
- Description of Involvement in Plan
- Does plan implementation include funding for entity? (*select yes -or no; if yes - specify amount*)
- Legal Name of Entity (if different than above)
- Tax Identification Number (from W9)

The following have additional options

- Section 4: Community Colleges and Institutes of Higher Education *select* Community Colleges or Institutes of Higher Education
- Section 5: Local and Regional Employers *select* Local Employer or Regional Employer
- Section 6: Other *specify*

Section 10

Consortium Partner Overview

- Total number of career center partners*
- Total number of community college and institutes of higher education partners*
- Total number of local or regional employer partners*
- Total number of manufacturing association partners*
- Total number of vocational technical school partners*
- Total number of workforce investment board partners*
- Total number of other partners*
- Total number of partners* *auto-populates, not editable*
- *Required Attachment**: Letters from all consortium partners listed within the application, signed by the consortium partner's authorized person, in the order listed within the application saved as one PDF * File saved as: Lead Applicant Name - Partner Letters

Section 11

Five Year Regional Training Plan - Region's Past and Present Manufacturing Workforce

The following answers should utilize and cite sources of information. Examples of sources: Regional Labor Market Blueprints, state data sets; additional local analysis; and studies completed by Regional Planning Agencies (and or related studies) to highlight the region's unique geography, communities, population/growth change, education demographics, workforce history, high-level trends, etc.

- Describe past and current trends affecting manufacturing workforce needs in the region. (Examples: growing, declining, emerging occupations)*
- What are the manufacturing labor supply challenges and demands for the region over the next five years based on the existing workforce in the region?*
- Provide details on how challenges and demands have been assessed. Examples of details to include: retirement and aging population, low high school graduation rate, education or workforce skills of existing labor pool, limited language proficiency, etc.*
- What is the present manufacturing training capacity in the region? (including all available programs)*
- What percentage of demand is being met by the present training capacity? Provide details regarding how this was estimated*
- What manufacturing occupations in the region are being prioritized? How were the occupations selected, and how do they align with the Regional Labor Market Blueprint in the consortia hub region?*
- For manufacturing occupations that require credentials, describe current programs and gaps in the region. Where applicable, Regional Labor Market Blueprint credential maps may be referenced.*
- For manufacturing occupations that do not require credentials, describe current programs and gaps in the region.*

Section 12

Five Year Regional Training Plan - Introductory Information

- Describe the process by which the consortium developed its Five Year Regional Training Plan and how the plan aligns to the Regional Labor Market Blueprint. Details should include specifically articulated strategies, outcomes, and continuous communication/shared accountability activities*
- Describe how the consortium's five year plan leverages the region's institutional assets, leadership, and how it connects to the Regional Planning Teams.*
- Describe how the consortium engaged businesses to develop its Five Year Regional Training plan*
- Provide information that outlines the consortium's qualifications and ability to implement a regional manufacturing training program. Include details such as: track records, history of successfully placing graduates in employment*
- What activities has the consortium implemented to date?*
- What is the overall strategy in the consortia region for increasing the manufacturing training capacity in that region?*
- What is the consortium's overall strategy for reaching target populations including: 1) unemployed; 2) underemployed; 3) veterans; 4) minorities; 5) women*

Section 13

Five Year Regional Training Plan – Recruitment

Present System

- What recruitment activities and methods are presently being undertaken to recruit trainees for programs?*

Plan Year 1

- What present recruitment activities and methods will continue to be deployed in Year 1?*
- What changes will be made to present recruitment activities and methods in Year 1?
- What new activities or methods would the consortium like to enact related to increased recruitment for manufacturing training in Year 1? (if applicable) Answer should include details regarding recruitment of target populations including: 1) unemployed; 2) underemployed; 3) women; 4) minorities; 5) veterans

- What outcomes are expected in Year 1?*
- Total Cost of Year 1 Recruitment Activities*
- Amount of Year 1 Recruitment Activities that the Advanced Manufacturing Training Program would fund*
- Percentage of Year 1 Recruitment Activities that would be funded by the Advanced Manufacturing Training Program* *auto-populates, not editable*
- What Year 1 Recruitment Activities would the Advanced Manufacturing Training Program fund?
- How many new trainees will be recruited in Year 1?* (number only, no commas)
- How many new trainees will enroll in Year 1?*
- How many incumbent worker trainees will be recruited in Year 1?* (number only, no commas)
- How many incumbent worker trainees will enroll in Year 1?*

Plan Year 2

- What changes will be made to recruitment activities and methods in Year 2? (if applicable)
- What outcomes are expected from these changes?

Plan Year 3

- What changes will be made to recruitment activities and methods in Year 3? (if applicable)
- What outcomes are expected from these changes?

Plan Year 4

- What changes will be made to recruitment activities and methods in Year 4? (if applicable)
- What outcomes are expected from these changes?

Plan Year 5

- What changes will be made to recruitment activities and methods in Year 5? (if applicable)
- What outcomes are expected from these changes?

Plan Results

- Over the course of the five years, what results will the recruitment activities and methods above achieve?*

Section 14

Five Year Regional Training Plan – Training

Present System

- What training programs are presently in the region?*
- What is the overall retention rate in the programs?*

Plan Year 1

- What present training activities and methods will continue to be deployed in Year 1?*
- What changes will be made to present training activities and methods in Year 1?
- What new activities or methods would the consortium like to enact related to increased manufacturing training in Year 1? (if applicable) Answer should include details regarding recruitment of target populations including: 1) unemployed; 2) underemployed; 3) women; 4) minorities; 5) veterans
- What outcomes are expected in Year 1?*
- Total Cost of Year 1 Training Activities*
- Amount of Year 1 Training Activities that the Advanced Manufacturing Training Program would fund*
- Percentage of Year 1 Training Activities that would be funded by the Advanced Manufacturing Training Program* *auto-populates, not editable*

- What Year 1 Trainee Activities would the Advanced Manufacturing Training Program fund?*
- How many new trainees will complete training in Year 1? (number only, no commas)
- How many incumbent worker trainees will complete training in Year 1?*
- Total number of trainees in Year 1* (auto-populates, not editable)
- Average cost of individual trained in Year 1* *auto-populates, not editable* (projected total # of individuals trained / total cost of Year 1 training activities)
- Average Advanced Manufacturing Training Program cost for individual trained in Year 1* *auto-populates, not editable* (projected total # of individuals trained / amount of Year 1 Training Activities the Advanced Manufacturing Training Program would fund)
- How many incumbent worker trainees will be recruited in Year 1? (number only, no commas)
- How many incumbent worker trainees will enroll in Year 1?*

Plan Year 2

- What changes will be made to training activities and methods in Year 2? (if applicable)
- What outcomes are expected from these changes?

Plan Year 3

- What changes will be made to training activities and methods in Year 3? (if applicable)
- What outcomes are expected from these changes?

Plan Year 4

- What changes will be made to training activities and methods in Year 4? (if applicable)
- What outcomes are expected from these changes?

Plan Year 5

- What changes will be made to training activities and methods in Year 5? (if applicable)
- What outcomes are expected from these changes?

Plan Results

- Over the course of the five years, what results will the training activities and methods above achieve?*

Section 15

Five Year Regional Training Plan – Placement

This section should include: 1) Services and strategies that will be implemented to meet employer needs; 2) Strategies and services for employer engagement; 3) Strategies and services for trainee placement

Present System

- What placement activities and methods are presently happening within the region?*

Plan Year 1

- What present placement activities and methods will continue to be deployed in Year 1?*
- What changes will be made to present placement activities and methods in Year 1?
- What new activities or methods would the consortium like to enact related to increased trainee placement in Year 1? (if applicable) Answer should include details regarding recruitment of target populations including: 1) unemployed; 2) underemployed; 3) women; 4) minorities; 5) veterans
- How many businesses does the consortium propose to engage in Year 1?
- What outcomes are expected in Year 1?*
- Projected number of new trainees that will be placed in employment in Year 1*
- Projected number of incumbent workers who will advance in employment level in Year 1*
- Total Cost of Year 1 Placement Activities*

- Amount of Year 1 Placement Activities that the Advanced Manufacturing Training Program would fund*
- What Year 1 Placement Activities would the Advanced Manufacturing Training Program fund?
- Percentage of Year 1 Training Activities that would be funded by the Advanced Manufacturing Training Program* *auto-populates, not editable*

Plan Year 2

- What changes will be made to placement activities and methods in Year 2? (if applicable)
- What outcomes are expected from these changes?

Plan Year 3

- What changes will be made to placement activities and methods in Year 3? (if applicable)
- What outcomes are expected from these changes?

Plan Year 4

- What changes will be made to placement activities and methods in Year 4? (if applicable)
- What outcomes are expected from these changes?

Plan Year 5

- What changes will be made to placement activities and methods in Year 5? (if applicable)
- What outcomes are expected from these changes?

Plan Results

- Over the course of the five years, what results will the placement activities and methods above achieve? (including projections about the increase in training capacity over the five years)*

Section 16

Five Year Regional Training Plan - Results and Review

- What are the longer term results that the consortium will achieve by the included activities, methods, programs, initiatives, and policies included within its plan? Examples: how many new workers will enter the workforce; will there be reductions in labor shortages, or will there be stabilization?*
- How will the results and review information feed into or align with Regional Planning Team implementation work?*
- How often and in what way (s) will the consortium partners meet to review progress towards its goals and make course corrections?*
- What sources of information, data, and measurement will the consortium rely on to support shared understanding of how well the consortium is meeting its goals and progress towards its vision?*

Section 17

Five Year Regional Training Plan – Current Trainings, Budget & Year 1 Summary

The following are auto-populated from information inputted into the corresponding plan section, and is not editable.

Region's Current Trainings and Plan Budget Excel

- *Required Attachment**: Plan Budget and Current Trainings in Region
File saved as: Lead Applicant Name – Region Trainings and Plan Budget

Details of Trainings and Plan Budget Excel can be found at bottom of application.

Plan Year 1 Recruitment

- Total cost*
- Advanced Manufacturing Training Program Amount*
- Advanced Manufacturing Training Program % of total*

Plan Year 1 Training

- Total cost*
- Advanced Manufacturing Training Program Amount*
- Advanced Manufacturing Training Program % of total*

Plan Year 1 Placement

- Total cost* *auto-populates, not editable*
- Advanced Manufacturing Training Program Amount*
- Advanced Manufacturing Training Program % of total*

Plan Year 1 Summary (Total of Recruitment, Training, Placement included with the Consortium's Five Year Advanced Manufacturing Training plan)

- Total cost*
- Advanced Manufacturing Training Program Amount*
- Advanced Manufacturing Training Program % of total*

Section 18

Application Submission

- Name and Title of person submitting application on behalf of lead applicant
- Date of Submission

Training Excel

Please Provide Details regarding all Trainings for the Application's Selected Region.

| Training Provider | Type of Training | Number of Hours | Type of Credential -or- Title of Credential | Pell Eligible? (select yes -or- no) | Capacity | Retention Rate % | Additional Information |
|-------------------|------------------|-----------------|---|--|----------|------------------|------------------------|
| | | | | | | | |

Budget Instructions

The cost proposal (budget) may be the basis of contract negotiation. The budget must include any and all costs associated with activities required to achieve project's goals.

In describing costs for each year, the following information should be included:

1. Name of individual or organization performing the work, or in the case of Direct Materials, the specific equipment or balance of system component to be funded;
2. Rate per hour and hours dedicated where applicable;

3. All budget information must be described to the greatest extent possible.

Budget Sections

Direct Labor Costs

This category is for project costs related to administration and management labor performed by employees of the applicant. The individuals, categories, or types of labor shown on this worksheet should coincide with the Application.

1. List each individual, category, or type of labor that will be required to complete the administration and management aspects of the work plan.
2. Input the labor rates for each individual, category, or type of labor. This rate should include salary and benefits only. It should not include other overhead expenses or a profit margin.
3. Indicate the quantity of hours each Task will require of each individual, category, or type of labor.
4. Identify any proposed escalation in the labor rates and the basis for such an escalation.

General & Administrative Expense / Overhead

This category is for overhead costs directly related to the administration and management of the project. These costs should be shown as a percentage of total direct labor costs only.

Subcontractors /Partner Costs

This category is for project costs related to project services provided to the applicant on a contract basis by individuals, organizations or companies who are subcontractors or consultants to the applicant.

1. List the specific members of the technical service provider's team who will be actively participating in this project.
2. Input the subcontractor/consultant quoted or anticipated rate per hour for each consultant. The proposal narrative should document when/where the consultant has received the proposed rate in performing similar services for others.
3. Indicate the quantity of hours each Task will require of each consultant.

Direct Material Costs

This category is for purchased parts, equipment, or assets uniquely associated with the proposed project.

Other Direct Materials

This category is for other direct project costs related to project administration and management. These items may include printing, postage, telephone, publications, graphics, etc.

Travel

This category is for travel costs related to administration and management personnel of the applicant and project partners.

1. EED will accept as a direct charge only that travel required to achieve the project goals, and to complete activities identified in the Work Plan. Mileage reimbursement will be accepted at the current federally approved rates.
2. Include a description indicating the need for the proposed travel, the estimated number of person-trips required, destinations, mode of travel, and cost basis of the transportation.
3. Identify and support any other special transportation costs that may be required in the performance of this project.

Budget Excel

| Direct Labor | | | | | | | |
|---|----------------------------------|----------------------|----------------|-----------------------|---------------------------------------|---------------------------|-------------------|
| Employee Name, Category, or Type of Labor | Function & Title (if applicable) | Direct or Admin Cost | Rate Per Hour | Total Number of Hours | Advanced Manufacturing Program Amount | Amount from Other Sources | Total Base Amount |
| <i>Example: Jane Smith</i> | <i>Trainer</i> | <i>Direct Cost</i> | <i>\$23.00</i> | <i>47</i> | <i>\$800.00</i> | <i>\$281.00</i> | <i>\$1,081.00</i> |
| | | | | | | | |
| Total: | | | | | \$ | \$ | \$ |
| | | | | | Total Direct | \$ | \$ |
| | | | | | Total Admin | \$ | \$ |

| Overhead, Fringe | | | | | | | |
|---|-------------------------------------|----------------------|--------------------|---------------|--|-----------------------------|---------------------|
| Employee Name, Category, or Type of Labor | Description of Overhead or Fringe | Direct or Admin Cost | Base Amount | Fringe Rate % | Advanced Manufacturing Program Fringe Amount | Other Sources Fringe Amount | Total Fringe Amount |
| <i>Example: Jane Smith</i> | <i>Health Insurance Payroll Tax</i> | <i>Direct Cost</i> | <i>\$ 1,081.00</i> | <i>21.00%</i> | <i>\$ 168.00</i> | <i>\$ 59.01</i> | <i>\$ 227.01</i> |
| | | | | 0.00% | | | |
| Total: | | | | | \$ | \$ | \$ |
| | | | | | Total Direct | \$ | \$ |
| | | | | | Total Admin | \$ | \$ |

| Subcontractors/Partners | | | | | | | |
|--------------------------------------|--|----------------------|----------------|-----------------------|---------------------------------------|---------------------------|-------------------|
| Name of Subcontractor of Partner | Description of Service | Direct or Admin Cost | Rate Per Hour | Total Number of Hours | Advanced Manufacturing Program Amount | Amount from Other Sources | Total Amount |
| <i>Example: Training Company XYZ</i> | <i>Provide CAD training for 20 weeks</i> | <i>Direct Cost</i> | <i>\$30.00</i> | <i>47</i> | <i>\$725.00</i> | <i>\$ 685.00</i> | <i>\$1,410.00</i> |
| | | | \$ - | | \$ - | \$ - | \$ - |
| | | | \$ - | | \$ - | \$ - | \$ - |
| Total: | | | | | \$ | \$ | \$ |
| | | | | | Total Direct | \$ | \$ |
| | | | | | Total Admin | \$ | \$ |

| | | | |
|--|-------------------------------|--------------------|---------------------|
| SUBTOTAL: Labor, Overhead, Subcontractors, partners | Advanced Manufacturing | Amount from | Total Amount |
|--|-------------------------------|--------------------|---------------------|

| | | | |
|--|-----------------|---------------|----|
| | ng Grant Amount | Other Sources | |
| | \$ | \$ | \$ |

| Direct Materials | | | | | | | |
|-------------------------|------------------------------|----------------------|------------|----------|-------------------------------------|---------------------------|-------------------|
| Item | Detailed Description of Cost | Direct or Admin Cost | Cost | Quantity | Advanced Manufacturing Grant Amount | Amount from Other Sources | Total Base Amount |
| Example: Store Y | CAD Software | Admin Cost | \$1,000.00 | 1 | \$725.00 | \$275.00 | \$1,000.00 |
| | | | \$ - | | \$ - | \$ | \$ |
| Total: | | | | | \$ | \$ | \$ |
| Total Direct | | | | | \$ | \$ | \$ |
| Total Admin | | | | | \$ | \$ | \$ |

| Other Direct Materials | | | | | | | |
|------------------------------|------------------------------|----------------------|------------|----------|-------------------------------------|---------------------------|--------------|
| Item | Detailed Description of Cost | Direct or Admin Cost | Cost | Quantity | Advanced Manufacturing Grant Amount | Amount from Other Sources | Total Amount |
| Example: Publications | Brochure to Mail | Admin Cost | \$1,500.00 | 1 | \$225.00 | \$1,275.00 | \$1,500.00 |
| | | | \$ - | | \$ - | \$ | \$ |
| Total: | | | | | \$ | \$ | \$ |
| Total Direct | | | | | \$ | \$ | \$ |
| Total Admin | | | | | \$ | \$ | \$ |

| Travel | | | | | | | |
|---|---|----------------------|----------|----------|-------------------------------------|---------------------------|--------------|
| Travel Type (i.e. mileage, parking etc) | Brief Description of Item and Purpose | Direct or Admin Cost | Cost | Quantity | Advanced Manufacturing Grant Amount | Amount from Other Sources | Total Amount |
| Example: Administrative Travel | parking, tolls for staff to attend job fair | Admin Cost | \$150.00 | 1 | \$100.00 | \$50.00 | \$150.00 |
| | | | | | \$ - | \$0.00 | \$0.00 |
| Total: | | | | | \$ | \$ | \$ |
| Total Direct | | | | | \$ | \$ | \$ |
| Total Admin | | | | | \$ | \$ | \$ |

| | | | |
|--|-------------------------------------|---------------------------|--------------|
| SUBTOTAL: Other Direct Expenses | Advanced Manufacturing Grant Amount | Amount from Other Sources | Total Amount |
| | \$ | \$ | \$ |