



MAURA HEALEY, GOVERNOR
KIM DRISCOLL, LIEUTENANT GOVERNOR

Workforce Innovation and Opportunity Act (WIOA)
Massachusetts Combined State Plan
DRAFT - STATE PLAN MODIFICATION

for the period of July 1, 2024, through June 30, 2028
Effective: July 1, 2024

Draft for Review

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Draft for Review



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LIEUTENANT GOVERNOR

March 4, 2024

The Honorable Julie Su
Acting Secretary of Labor
U.S. Department of Labor
200 Constitution Avenue, N.W.
Washington, D.C. 20210

Dear Acting Secretary Su:

We are pleased to submit Massachusetts's *Combined State Plan* for the Workforce Innovation and Opportunity Act (WIOA), a unified effort to articulate our state's workforce development vision, goals, and strategies to meet the needs of jobseekers and businesses to promote a thriving economy.

The Healey-Driscoll Administration emphasizes teamwork and partnership in delivering services, programming, and resources for Massachusetts residents. We took this collaborative approach to establish our state workforce plan, especially focused on improved outcomes for employers, jobseekers, and the broader workforce ecosystem. The *2024 Massachusetts WIOA Combined State Plan*, titled "*Meeting the Moment to Attract, Retain and Develop a Future Workforce*" is the result of a year-long, comprehensive planning process with internal and external stakeholder engagement, listening sessions, forums and planning discussions, and an extensive public comment period.

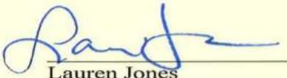
Our statewide workforce plan represents all major workforce, education, employer, and state partners joined together under a unified vision and strategy. Building on the 2016 and 2020 state plans, the *2024 Massachusetts WIOA Combined State Plan* identifies new, enhanced, and innovative strategies to better serve priority populations and employer needs in an increasingly evolving work environment. Moreover, Massachusetts is an inclusive state, and our state workforce plan represents strategies to support individuals often underrepresented or underserved, newly arrived migrants and refugees, and untapped talent—all with amazing potential to meet the needs of employers, large and small, in industries statewide. Finally, our state workforce plan embraces the federally determined metrics and adopts supplemental state-defined metrics to track progress and identify areas for improvement moving forward.

Massachusetts's goal is to provide the best public workforce system in the United States to benefit both jobseekers and employers. To achieve this, we have and will leverage both the guiding principles of WIOA and the strategies in our state plan to unlock opportunities for all residents in Massachusetts.

Sincerely,


Maura Healey
Governor


Kimberley Driscoll
Lieutenant Governor


Lauren Jones
Secretary of Labor and
Workforce Development


Joanne Pokaski
Chair, MassHire State Workforce
Board

STATE PLAN FORMAT

The *Massachusetts WIOA State Plan* is organized based upon the Planning Guidance from the United States Department of Labor (USDOL). The questions from the Planning Guidance are retained in the *State Plan* to provide readers with context.

The federal government will review the *State Plan* through the relevant federal agencies including: the U.S. Department of Labor (USDOL); U.S. Department of Education's Office of Career, Technical, and Adult Education (OCTAE); Rehabilitation Services Administration (RSA), and the Administration for Children and Families (ACF).

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March 2026 Message from the Secretary and MassHire State Workforce Board Chair

Two years ago, the Healey-Driscoll Administration released its first workforce agenda for Massachusetts—a collaborative effort across multiple state agencies and workforce partners to build a robust talent pipeline and skilled workforce. At the time, Massachusetts was experiencing a labor shortage and low unemployment, with a need for the state to use every tool to address the shortage. Now in 2026, the state’s labor market and economy, as seen in other parts of the country, are defined by more jobseekers than available jobs and a higher, yet stabilized, unemployment rate. Local and national economic headwinds call for even greater intentionality to effectively deliver workforce strategies that connect skilled individuals to hiring employers and to build talent pipelines ready to meet the needs of growing industries.

The Healey-Driscoll Administration is committed to a “Team Massachusetts” approach, bringing the strength of coordinated government resources and public-private partnerships to advance and re-energize the economy. We are committed to removing barriers to employment, supporting workforce productivity and retention, developing a strong talent pipeline in collaboration with education and employers, and advancing and modernizing our workforce system infrastructure to meet this moment and drive a more competitive Commonwealth for Massachusetts.

The enclosed summary highlights a snapshot of our progress in advancing Massachusetts’ vision of “Meeting the Moment to Attract, Retain, and Develop a Future Workforce.” Team Massachusetts has made great strides in two years, with more work on the horizon. On behalf of the MassHire State Workforce Board and the Healey-Driscoll Administration, we look forward to continued collaboration across state agencies and workforce partners, including employers, labor, higher education, training providers, and more, to grow a strong, resilient workforce in Massachusetts.

Lauren Jones

Secretary of Labor and Workforce Development
and Development
Commonwealth of Massachusetts
Health

Joanne Pokaski, Board Chair
AVP for Workforce Planning

Beth Israel Lahey

Focus Area I: Talent Attraction and Retention

Massachusetts must reduce and remove barriers to both employment and hiring to increase labor market participation for disconnected workers and foster a more accessible workplace, to drive talent attraction and retention across the Commonwealth. Strategies and investments to attract and retain talent focus on transportation, childcare, language barriers, and strategies that align with a focus on improving worker mobility and employer driven training.

Strengthen Work Supports

The Executive Office of Labor and Workforce Development (EOLWD) launched the Massachusetts Workforce Skills Fund in September 2024 to provide \$3,000 to \$5,000 stipends for eligible unemployed and underemployed Massachusetts residents enrolled in job training. Designed as a pilot program in partnership with Commonwealth Corporation and the MassHire Department of Career Services and leveraging ARPA funding, the fund focused on eligible participants in the state's Career Technical Initiative and Workforce Competitiveness Trust Fund programs. Between September 2024 and January 2026, the pilot reached **1,403 program participants**. In early 2026, EOLWD will finalize evaluation of the impact of this pilot including access, enrollment, completion, and employment outcomes

Increase Access to Transportation to Work

MassHire Department of Career Services (MDCS) in collaboration with MassHire career centers are committed to connecting jobseekers and workers to local transportation. Leveraging Workforce Innovation Opportunity Act (WIOA) funded services, the MDCS provided **over 855** jobseekers with **3525** transportation-related supportive services between July 2024 and December 2025. This dedicated investment resulted in a near doubling of services offered before the program on an annual basis. These services are complemented by the Healey-Driscoll Administration's launch in October 2024 of free regional transit in partnership with 13 regional transit authorities statewide.

Increase worker retention

Reskilling and upskilling incumbent workers is a key strategy to support worker retention in Massachusetts. The Workforce Training Fund Program (WTFP) awarded **\$37.2 million in FY 2024** and an additional **\$24 million in FY 2025**, totaling over **5,000 grants** to strengthen the skills and support retention among incumbent workers. The WTFP is funded by Massachusetts employers as a component of the state's Unemployment Insurance Trust Fund (UITF) and administered by Commonwealth Corporation. Massachusetts employers who pay into the UITF may benefit to upskill existing workers. Among grantees of the WTFP General Program (one of two WTFP programs), this investment in upskilling and retaining existing talent also spurred the creation of **7,800 new jobs** in FY 2024 and FY 2025, a **21 percent net growth in FY 2024** and an **8.7 percent net growth in FY 2025** of employees among participating employers.

Promote ESOL for Work

Recognizing a need to activate disconnected workers with language barriers, the Workforce Skills Cabinet established promoting ESOL for Work as a priority with plans to create and implement a statewide strategy. In January 2025, Governor Healey proposed significant investment to leverage state funding to scale ESOL for Work. With the support of the legislature, the Healey-Driscoll Administration secured \$10 million and established through the Workforce Skills Cabinet's ESOL for Work as an explicit funding priority to expand upon and align existing and potentially new grant programs within the state program resources. Currently, Massachusetts has nearly 100 adult education and ESOL programs serving over 30,000 participants. Through the Workforce Skills Cabinet, the administration is currently expanding access for ESOL programs to over 3,000 additional

participants, reducing the ESOL waitlist maintained by DESE, increasing coordination between workforce and education partners, and increasing vocationally oriented ESOL program opportunities.

In coordination with the Workforce Skills Cabinet, the SWDB has also set ESOL for Work as one of its key short-term workforce strategies for implementation and is actively participating in expanding access for vocational ESOL.

Incorporate a whole-of-government approach to caregiving

Governor Healey signed an Executive Order in January 2024 that established the **Interagency Task Force on Early Childhood Education and Care**, co-chaired by the Secretaries of Education, Labor and Workforce Development, and Economic Development with a “whole of government” approach and participation across all secretariats to ensure Massachusetts delivers an affordable, accessible, and high-quality child care system. Following a series of listening sessions and engagements, the Task Force established approximately 30 recommendations. Since 2025, the Task Force has been prioritizing these recommendations including efforts to build a strong workforce within early childhood education. Updates on these recommendations will be released in late winter 2026.

Additionally, EOLWD relaunched the **Massachusetts Caregivers Coalition** in May 2024 to focus on professional caregivers as well as the needs of those who are in the workforce but also play a role as a primary caregiver in their personal lives. Caregiving infrastructure is critical to reducing barriers to employment. The coalition works with business, labor, and government partners to promote and share best practices and resources to increase productivity for caregivers at work and home, attract untapped talent managing caregiving responsibilities, and retain existing talent navigating work-life balance in the workplace. In addition to hosting regular convenings with employers, advocates, and government partners, the Coalition hosted its inaugural Caregiver Champion Awards at the Massachusetts State House to recognize individuals and organizations who demonstrate exceptional commitment to supporting family caregivers in the workplace.

Focus Area II: Talent Development

The Healey-Driscoll Administration focuses on developing talent by both supporting priority populations and promoting targeted, high growth industries and the needs of employers, industries that include some of the most in-demand and high-wage occupations. These strategies include closely working across state agencies to close skills gaps, building talent through registered apprenticeship and other work-based learning opportunities, and strengthening digital literacy especially with AI-related skills to compete.

Support Priority Populations

Through the MassHire State Workforce Board and collaboration with WIOA partnering state agencies, Massachusetts is developing talent especially among discouraged, underemployed, and unemployed residents, as well as individuals disconnected from the Massachusetts labor market including youth, immigrants, individuals with different abilities, low-income individuals, and veterans. As part of this effort, the State Workforce Advisory Committee (SWAC), represented by multiple state agencies, meet on a regular basis to collaborate, identify opportunities for leverage, and align resources to effectively support priority populations.

- **Youth:** Through WIOA funded programs for youth, Massachusetts provided **1,648 in-school and out of school youth** aged 14-24 with training and employment opportunities in FY 2025. Programming included youth-centered design strategies to achieve education completion, skills development, and employment with resources such as HiSet/GED preparation, soft skills

development, registered apprenticeships, and other work experiences, and transitions to Massachusetts' free community college program.

- **Immigrants:** Through the Workforce Skills Cabinet, Massachusetts is focused on building career pathways and economic mobility among immigrants, with immigrants comprising nearly 18 percent of the population. In addition to scaling ESOL for Work as discussed above, the Workforce Skills Cabinet has identified opportunities to help immigrants recredential to fill key sector specific workforce needs. Following the passage of the Physician Pathway provision in the Mass Leads Act of 2024, the Department of Public Health is implementing a policy to allow foreign trained and licensed physicians to practice medicine in Massachusetts. In addition, the Workforce Skills Cabinet in 2026 will begin implementation planning of another provision in the Mass Leads Act to assist skilled workers with foreign credentials in achieving Massachusetts credentials and joining the workforce in their trade.
- **Different Abilities:** Building on collaboration through the SWAC, state agencies work in partnership to advance employment opportunities for people with different abilities. Among collaborative efforts includes the MassAbility and MassHire Training Partnership, which supports enrollment for individuals with disabilities for occupational skills training from the Massachusetts Eligible Training Provider List with the goal of increasing job placement and employment outcomes. From January 2023 to December 2025, this partnership enrolled **170 individuals with disabilities** into occupational skills training related to industries including Healthcare, Information Technology, and Administrative Support.

Additionally, DESE's Adult and Community Learning Services (ACLS) partners with HiSET vendors to decrease the documentation needed to provide an accommodation for extended testing time, ensuring that access to an accommodation is more universal and less burdensome to obtain. In working specifically with the Massachusetts Commission for the Blind and the Department of Transitional Assistance, this SWAC partnership conducts trainings in each DTA office on how to work with consumers with visual impairments.

Among youth with disabilities, MassAbility's NexGen Careers initiative partners with the MDCS to enroll young adults ages 18 to 30 years old into STEM-related training from the Eligible Training Provider List and collaborate on case management to improve long-term career outcomes. Since July of 2023, the Healey-Driscoll Administration has also awarded \$2.8 million in grant funding to 13 organizations to provide training, employment placement, and post-placement support for **294 young adults with disabilities** through state funding for the Young Adults with Disabilities Grant program administered by Commonwealth Corporation.

- **Low-income Workers:** Several initiatives are underway to support low-income workers including:
 - **Department of Transitional Assistance (DTA) Worker Participant Programs (WPP)** for both TANF and SNAP recipients provide clients with tailored and appropriate job readiness, job matching, coaching and referrals to employment through MassHire Career Centers. From July 1, 2024 to January 20, 2026, **1738 DTA clients** enrolled in the Workforce Participation Program and received MassHire career center services.
 - **Empower to Employ (ETE)** supported by DTA and MassAbility provide enhanced opportunities for workforce engagement for TAFDC families with disabilities. Program participants receive direct referrals to MassAbility for eligibility and vocational needs, individualized coaching, access to vocational support, employment services, disability assessment, intensive co-case management, vocational and job readiness skills

- training, and job placement. ETE is available to clients served through Brockton, Quincy, Lawrence, North Shore and Fitchburg DTA offices.
 - **Mass Skills, Training, and Education Programs (MassSTEP)** through the Department of Elementary and Secondary Education's Adult and Community Learning Services (ACLS) provides concurrent education, workforce training, and job preparation. MassSTEP program help students learn English, earn a high school credential, and earn industry-recognized credentials in areas such as advanced manufacturing, healthcare, and information technology.
 - **MassHire Careers Partnership (MCP)**, a partnership with MassHire and the Executive Office of Housing and Livable Communities, provides career center services to Section 8 voucher holders. From January 2023 to January 20, 2026, **595 Section 8 voucher recipients** received MassHire career services including career and training services, and assistance with job placements. The MCP partnership operates across the Brockton, Lowell, Springfield, and Worcester regions.
- **Veterans:** MDCS and the Executive Office of Veterans Services (EOVS) have partnered to improve access to services for Veterans. Through this collaboration, MDCS and EOVS have streamlined the referral process for Veteran Service Officers and MassHire Veteran Representatives to connect Veterans receiving Chapter 115 Benefits to MassHire Career Center services. MDCS and EOVS have also established a data sharing agreement, enabling EOVS to share information and increase awareness of benefits available to qualifying Veterans and their families that are registered with MassHire. Through this coordination, MDCS has served an increasing number of veterans each year, serving **188 in 2023, 193 in 2024, and 207 in 2025**. Additionally, MDCS and EOVS worked together to implement the Veterans Hire Tax Credit, which incentivizes businesses to hire qualified Veterans. This tax credit provides small businesses with fewer than 100 employees with a \$2,500 tax break for each qualified Veteran they hire.
- **Formerly Incarcerated Individuals:** The Re-Entry Workforce Development Demonstration Program (RWDDP) is an initiative administered by Commonwealth Corporation on behalf of EOLWD with the goal of improving workforce outcomes for individuals returning to their communities after incarceration. In December 2025, **\$2.2M in grants were awarded to 11** different community organizations to stand up training for **389 returning citizens**. Additionally, EOLWD and MDC team up with the Executive Office of Safety and Security and the Department of Corrections to create a warm handoff, including a JobQuest orientation and referrals to the proper career center services, for incarcerated individuals scheduled to be released within the next 6 months. The MassHire Fidelity Bond Program exists to incentivize businesses to hire formerly incarcerated individuals.

Promote Targeted, High-Growth Industries and Employer Needs

Since launching the workforce agenda, the Executive Office of Labor and Workforce Development has made significant progress in strengthening and expanding effective strategies, programs, and resources to develop untapped talent. Over the past year, we have been engaging with employers statewide and across regions to identify targeted workforce needs in high-growth industries and align our efforts to ensure Massachusetts workers are equipped with the skills needed to meet employer demand.

Regional Workforce Skills Teams: The Massachusetts Workforce Skills Cabinet Teams have been working with regional MassHire Workforce Boards and local partners, employers, labor, higher education, and training providers to identify, analyze and prioritize industries and occupations to build talent development strategies that meet the needs of employers. During Fall 2024, the regional

Workforce Skills Teams launched the third iteration of regional blueprints to drive collaborative work on strategies to invest in career pathways and employment outcomes among the top occupations locally and regionally—like health care and human services, advanced manufacturing, life sciences, clean energy, and tech/IT including Cybersecurity. Visit [<https://www.mass.gov/lists/regional-workforce-blueprints>] to view the latest blueprints.

MassTalent

The Healey-Driscoll Administration launched in October 2024 the MassTalent online platform to enhance connections for employers with skilled talent and empower jobseekers with tailored career opportunities, especially in high-growth industries such as advanced manufacturing, clean energy, health care and human services, IT, and the life sciences. MassTalent combined efforts through the Executive Offices of Labor and Workforce Development, Economic Development, Health and Human Services, Energy and Environmental Affairs, Education, and related agencies and quasi-public agencies to promote sector-based industry job training to build a skilled talent pool to meet the demands of local employers. The MassTalent initiative demonstrated the need to be more nimble and communicative in connecting employers with talent, transitioning to align with the state’s effort to modernize the MassHire workforce system.

Apprenticeship Pipelines

The Healey-Driscoll Administration has focused on aligning registered apprenticeship pipelines to industry priorities and projected demands in construction and expanded industries. Between January 2023 and September 2025, the Division of Apprentice Standards (DAS) registered more than **10,000 apprentices**, including over 2,000 new expansion industry apprentices in fields like early education, health care, life sciences, financial services, and technology. Additionally, since 2023, DAS has approved more than 250 new apprenticeship programs. Also, since January 2023, more than \$10 million in state and federal grant funding has been awarded to organizations to develop and scale registered apprenticeship and pre-apprenticeship programs. Most recently, USDOL awarded DAS a three-year \$5 million grant to scale registered apprenticeship programs for early childhood education—the largest federal apprenticeship grant in the Commonwealth’s history.

Build MassReconnect and MassEducate

MassEducate, including MassReconnect, delivers free community college in partnership with the state’s 15 community colleges. MassEducate has proven to serve as a workforce strategy by expanding access and opportunity for individuals to gain the skills to pursue meaningful careers in Massachusetts.

Between the fall of 2022 and implementation of MassEducate and MassReconnect in 2023 and fall 2025, enrollment at Massachusetts’ 15 community colleges rose by 38.5 percent, adding 23,977 students for a total of 86,321 total students enrolled. Investing state resources to provide Massachusetts residents with free community college will serve as a catalyst to build a strong, competitive workforce and meet the needs of hiring employers in every region of the state.

Address AI and the Future of Work

The **Massachusetts AI Task Force** developed a strategic framework to position Massachusetts as a global leader in applied artificial intelligence (AI) through the creation of the Massachusetts AI Hub. In December 2024, the task force presented its final recommendations to the Governor outlined in a [report](#), which underscores several workforce strategies including upskilling and reskilling talent with AI tools, integrate AI Literacy in K-12 schools, and leverage apprenticeships, micro-credentials, and work-based learning to bridge skills gaps among other strategies. In 2025, the Healey-Driscoll Administration also launched the AI Hub which includes a focus on education and workforce development, in collaboration with the Workforce Skills Cabinet and with upcoming initiatives in development for 2026.

Focus Area III: Leadership by Example

Massachusetts is positioned to strengthen and scale effective strategies, programming, and resources to develop untapped talent, especially with the Governor and Executive Branch leading by example and the Commonwealth as the largest employer in Massachusetts.

MassSkills Coalition

In January 2024, Governor Healey signed an executive order directing state agencies to institute skills-based hiring. The Commonwealth is leading by example, recognizing that skills-based hiring expands access and opportunity to attract, retain, and develop talent that may have the skills, knowledge, and ability but not a four-year degree. While the Executive branch has adopted this hiring policy thanks to the Executive Order (EO), we also know many employers have incorporated a skills-based hiring strategy as a workforce tool to compete.

Following the EO, the MassSkills Coalition was launched to convene employers from every sector across the state, who are committed to sharing, learning, reimagining, and implementing new ways to assess, hire, train, upskill, and retain talent leading with skills first.

In 2025, the MassSkills Coalition partnered with Grads for Life to establish a learning community and convene stakeholders regularly with a focus on establishing skills-first best practices. The coalition anticipates releasing a toolkit in partnership with Grads for Life in 2026.

Focus Area IV: Workforce System Infrastructure

In a post-pandemic environment, Massachusetts needs to modernize and strengthen the infrastructure and coordination across the MassHire public workforce system and workforce partner agencies to improve support for jobseekers and employers.

MassHire Innovation Project

The Healey-Driscoll Administration is prioritizing modernizing and strengthening Massachusetts' workforce infrastructure to expand opportunities for jobseekers, workers, and employers alike. Improving coordination across the MassHire public workforce system is key to delivering on this priority especially to enhance efficiency, streamline services, and leverage technology to create a more accessible and effective workforce development system. Strategies include:

- **Launching Employment Modernization Transformation Phase 2** in 2025 to integrate statewide workforce systems for improved data sharing and service delivery (Phase 1 supports modernizing the state's unemployment insurance system).
- **Activating the Project Roadmap** to develop the next generation of career services delivery. During 2025, EOLWD engaged 5,885 stakeholders in 127 research activities, including surveys, direct engagement, and specialized workshops to inform and develop the project road map for the future-state MassHire career services delivery system.
- **Developing a "One Door"** entry system for WIOA partners to create seamless access to workforce services across agencies. These efforts will enhance data-driven decision-making, reduce redundancies, and create a more user-friendly experience for job seekers, employers, and workforce professionals.
- **Improving "talent front door" experiences for both jobseekers and employers** with the launch of MassTalent in the fall of 2024, building on JobQuest's long-standing tool leveraged by the MassHire system. In October 2024, MassTalent launched a new website to enhance the experience, making it easier for jobseekers to find opportunities and employers to find

talented people especially in the life sciences, advanced manufacturing, clean energy, health care and human services, and IT. A campaign was launched, driving traffic to a streamlined user experience via www.mass.gov/masstalent. In 2025, MassHire began the process to replace the JobQuest system with a modern, customer focused solution, to drive interconnectivity between employers, career centers, and jobseekers as part of the MassHire Innovation Project.

- **Strengthening the MassHire State Workforce Development Board** with recruitment and engagement of 12 new members representing some of the largest employers in the state, launching a board strategic priority process, and establishing new subcommittees. The MassHire State Board began 2026 well positioned to leverage partnerships between the public and private sectors to advance key strategies from the State Workforce Agenda.

About the MassHire State Workforce Board

The MassHire State Workforce Board (MSWB) operates under the Executive Office of Labor and Workforce Development and works closely with the MassHire network, which includes 16 regional workforce boards and career centers across the state. The MSWB is responsible for guiding and overseeing the Commonwealth's workforce development system, ensuring it aligns with economic needs and employer demand. The MSWB is comprised of business leaders, community partners, union representatives, and state and local agency partners.

MassHire State Workforce Board Membership List

Membership as of February 2026

Joanne Pokaski, Chair	Beth Israel Lahey Health, Assistant Vice President for Workforce Planning and Development
Lauren Jones	Executive Office of Labor and Workforce Development, Secretary
Kelly Aiken	Director of Workforce Development, UMass Memorial Health
Jennifer Almeida	Massachusetts Restaurant Association, Director of Education
George Atanasov	Johnson & Johnson, Head, Government Affairs Risk & Response, Worldwide Government Affairs & Policy
Connie Cabello	State Street Corporation, Managing Director – Global Inclusion & Diversity
Paul Coogan	City of Fall River, Mayor
Derek Costa	Bristol County Agricultural High School, Superintendent
Kip Diggs	State Representative, 2 nd Barnstable
Sherry Dong	Community Benefits and Community Health Initiatives, Executive Director, Tufts Medical Center
Pam Eddinger, PhD	Bunker Hill Community College, President
Maria J. Ferreira-Bedard	Southeastern Massachusetts SER-jobs for Progress, Inc., Executive Director
Shawn Fitzpatrick	WuXi Biologics, Senior Director of Manufacturing
Rainer Gawlick	Board Chairman, Protolabs; Board Member, Progress
Joshua Garcia	City of Holyoke, Mayor
Maddrey Goode	New England Culinary Arts Training, Executive Director
Megan Driscoll Greenstein	Megan Driscoll Consulting, Founder and CEO
Tara Kelly	INSpire Cafe, Director
Bob LePage	Executive Office of Education, Assistance Secretary for Career Education
Chrissy Lynch	Massachusetts AFL-CIO, President
Randall Lyons	Massachusetts Marine Trade Association, Executive Director
Nancy Luc	Building Pathways, Executive Director
John Mann	Commonwealth of Massachusetts/NAGE, National Vice President
Tonja Mettlach	Massachusetts Business Roundtable, Executive Vice President
Zenobia Moocchala	Executive Office of Economic Development for the Commonwealth of Massachusetts, Undersecretary of Business Strategies
Taylor Medeiros	Encore Boston Harbor, Director - Learning & Culture
Radhames Nova	Junior Achievement of Greater Boston, President and CEO

Elizabeth Skidmore	Liz Skidmore Consulting, Consultant
Jake Oliveira	State Senator, Hampden, Hampshire and Worcester
Toni Wolf	EXO-Commissioner of MassAbility
Liseth Velez	LJV Development, Founder and CEO
Anna Yu	Artists for Humanity, Former Executive Director
Patricia Yu	Executive Office of Health and Human Services, Senior Director of Healthcare Workforce Policy

I. WIOA STATE PLAN TYPE

Unified or Combined State Plan. Select whether the State is submitting a *Unified* or *Combined State Plan*. At a minimum, a State must submit a *Unified State Plan* that covers the six core programs.

Unified State Plan. This plan includes the Adult Program, Dislocated Worker Program, Youth Program, Wagner-Peyser Act Program, Adult Education and Family Literacy Act Program, and Vocational Rehabilitation Program.

✓ ***Combined State Plan.*** This plan includes the Adult Program, Dislocated Worker Program, Youth Program, Wagner-Peyser Act Program, Adult Education and Family Literacy Act Program, and Vocational Rehabilitation Program as well as one or more of the optional *Combined State Plan* partner programs identified below. Indicate which *Combined State Plan* partner program(s) the State is electing to include in the plan.

- Temporary Assistance for Needy Families Program (42 U.S.C. 601 et seq.)
- Employment and Training Programs under the Supplemental Nutrition Assistance Program (Programs authorized under section 6(d)(4) of the Food and Nutrition Act of 2008 (7 U.S.C. 2015(d)(4)))
- Work programs authorized under section 6(o) of the Food and Nutrition Act of 2008 (7 U.S.C. 2015(o))
- Trade Adjustment Assistance for Workers Programs (Activities authorized under chapter 2 of title II of the Trade Act of 1974 (19 U.S.C. 2271 et seq.))
- Jobs for Veterans State Grants Program (Programs authorized under 38, U.S.C. 4100 et. seq.)
- Unemployment Insurance Programs (Programs authorized under State unemployment compensation laws in accordance with applicable Federal law)
- Senior Community Service Employment Program (Programs authorized under title V of the Older Americans Act of 1965 (42 U.S.C. 3056 et seq.))

Introduction to the *Massachusetts WIOA Combined State Plan*

Governor Maura Healey and Lieutenant Governor Kim Driscoll are two leaders dedicated to advancing opportunities for workers, ensuring employers have the skilled workforce they need to succeed, and lifting all regional economies to drive competitiveness, affordability, and equity across Massachusetts.

When Governor Healey and Lt. Governor Driscoll were sworn into office on January 5, 2023, Massachusetts and the nation experienced historic firsts—the first woman-elected governor in Massachusetts, the first openly lesbian governor in the country, and the first women-led duo to govern the Commonwealth of Massachusetts. This wave of new leadership in Massachusetts signaled the importance of ensuring greater equity in both government and

communities statewide. In its first year as a new team, the Healey-Driscoll Administration recognized the opportunity and urgency to meet this moment.

Building on this foundation, the Healey-Driscoll Administration understands how critical the state's workforce is and will be to fuel economic prosperity in Massachusetts. Now more than ever, Massachusetts will benefit from a strategic workforce agenda that identifies priorities, goals, and strategies to attract, retain, and develop talent while also fostering an innovative, collaborative, and equitable workforce system. ***Massachusetts' Workforce Agenda: Meeting the Moment to Attract, Retain, and Develop a Future Workforce*** details a comprehensive plan defined by four focus areas:

1. Talent Attraction and Retention
2. Talent Development
3. Lead by Example
4. Workforce System Infrastructure

In recent years, the workforce has dramatically changed in Massachusetts, nationally, and globally. Described in Massachusetts' [2023 Economic Development Plan](https://mass.gov/doc/economic-development-plan), (mass.gov/doc/economic-development-plan) the global pandemic reset economies at all levels impacting Massachusetts industries and workforce demands. An increasingly mobile, remote, and hybrid workforce combined with accelerated technology, increased costs, downsized workplaces, shifts in downtown districts, importance on mental health, access, and costs for quality caregiving, and so many more factors continue to evolve and have adjusted the needs for both workers and employers.

In the aftermath of the global pandemic, the Massachusetts labor market increasingly tightened as workers and jobseekers left the labor market, remained disconnected from the workforce, and felt discouraged from re-entering the labor market due to several barriers to access meaningful employment. Today, persistent inequities exist in the Massachusetts labor market based on race, ethnicity, gender, gender identity, class, economic status, physical and mental ability, geography, religion, and Veteran status. At the same time, employers across all industries have and continue to face urgent needs to attract, retain, and develop talent to meet hiring demands not only for today but also projected over time. ***Massachusetts' Workforce Agenda*** includes an economic analysis section with detailed workforce trends.

Nevertheless, the Healey-Driscoll Administration and the Commonwealth of Massachusetts believe in the power of its people and the strength of its diverse workforce. The greatest asset in Massachusetts is the collective skills, talents, and efforts of every resident. Moreover, every individual should have the opportunity to contribute to the state's workforce and be rewarded fairly and equitably. The Healey-Driscoll Administration is dedicated to addressing disparities in the state's workforce and workforce system by creating a labor market that is inclusive, fair, and representative of the diversity of in Massachusetts. The strength of the state's economy is its workforce. Massachusetts has and will thrive when its workers are connected to opportunities that will influence innovation and empower economic growth for employers representing all industries.

There are over 242,000 active job postings that remain unfilled (as of November 2023), and all sectors of the economy are projected to increase employment by 2030. High growth industries such as the life sciences, health care and human services, clean energy, and advanced manufacturing are among the industries with the greatest demands and opportunities statewide. Additionally, regional workforce partners from the Berkshires to the Cape and Islands have partnered with the Healey-Driscoll Administration to examine industries and occupations in greatest need to close the workforce skills gaps and build the workforce local economies need to thrive.

Massachusetts must meet this moment by increasing access and opportunity for residents and new arrivals including untapped and future talent. By leveraging key goals and strategies outlined in **Massachusetts' Workforce Agenda**, the Commonwealth will unlock greater equity, create pathways, and skill building to meet demands, and ensure Massachusetts' workers and rising talent are positioned for success and skilled to fill the thousands of jobs available today and projected for the future.

The *U.S. Department of Labor's (USDOL) 2024-2028 Workforce Innovation Opportunity Act (WIOA) State Combined Plan* served as an opportunity for the Healey-Driscoll Administration including the MassHire State Workforce Board, Executive Office of Labor and Workforce Development, and collaborative state agencies to engage stakeholders and communities to prioritize goals, identify effective strategies, and enhance partnerships to create a workforce development roadmap for the next four years. The **Massachusetts' Workforce Agenda** reflects the Healey-Driscoll Administration's first workforce agenda, incorporating equity, competitiveness, and affordability combined with measurable goals to develop a skilled workforce to benefit workers and employers, and in turn, strengthen Massachusetts' economic prosperity.

Purpose

Massachusetts' Workforce Agenda: Meeting the Moment to Attract, Retain, and Develop a Future Workforce serves as the Healey-Driscoll Administration's first workforce agenda, which contributes directly to the *U.S. DOL 2024-2028 WIOA State Plan*. Together, the workforce agenda and *WIOA State Plan* will benefit the Commonwealth's workforce system in several ways:

- The *State Plan* sets forth the workforce agenda for the Healey-Driscoll Administration, reflecting the Governor and MassHire State Workforce Board's Vision, Mission, Goals, and Strategies in collaboration with workforce partners.
- The *State Plan* acts as a framework for major public workforce system partners, including WIOA partners, on operations, coordination, and new strategies.
- The *State Plan* framework is applied to and represents over \$400 million in state and federal funding across partners.
- The *State Plan* outlines the synergy between state and local partners by articulating the coordination of services across and between agencies including the Executive Office of Labor and Workforce Development, the Departments of Unemployment Assistance and Career Services, the MassHire system, the Executive Office of Health

and Human Services, the Department of Transitional Assistance (DTA), Massachusetts Rehabilitation Commission (MRC), Massachusetts Commission for the Blind (MCB), the Executive Office of Veterans Services, the Executive Office of Elder Affairs program, education partners including the Executive Office of Education, the Department of Elementary and Secondary Education including its Adult and Community Learning Services department, and reentry partners including the Executive Office of Public Safety and Security and the Department of Corrections among collaborators statewide.

- The *State Plan* builds consensus and focus across stakeholders in a workforce ecosystem that is a complex combination of federal and state programming.

II. STRATEGIC ELEMENTS

(a) The Economic, Workforce, and Workforce Development Activities Analysis which Massachusetts's workforce system and programs will operate

(1) Economic and Workforce Analysis

(A) **Economic Analysis** includes an analysis of the economic conditions and trends in Massachusetts, including sub-state regions and any specific economic areas identified by the State. This includes:

(i) **Existing demand in sectors and occupations**, an analysis of the industries and occupation in which there is existing demand.

(ii) **Emerging Demand Industry Sectors and Occupations**. An analysis of the industries and occupations for which demand is emerging

(iii) **Employers' Employment Needs**. With regard to the industry sectors and occupations identified in (A) (i) and (ii), an assessment of the employment needs of employers, including a description of the knowledge, skills, and abilities required, including credentials and licenses.

(B) **Workforce Analysis** includes an analysis of the current workforce including individuals with barriers-to employment, as defined in section 3 of the WIOA. This population must include individuals with disabilities among other groups in the State and across regions identified by the State. This includes

(i) **Employment and Unemployment**. An analysis of current employment and unemployment data, including labor force participation rates, and trends in the state

(ii) **Labor Market Trend**. An analysis of key labor market trends, including across existing industries and occupations

(iii) **Education and Skill Levels of the Workforce**. Provide an analysis of the educational and skill levels of the workforce.

(iv) **Comparison of Economic and Workforce Analytical Conclusion**. Describe areas of opportunity for meeting hiring, education, and skills needs identified in the economy compared to the assets available in the labor force in the state.

A. Economic Analysis

TWO YEAR UPDATE

Economic Analysis

From a Shortage of Workers to a Shortage of Jobs

This section explains the changes in the economy since the previous state plan. It compares the labor market of 2023 (reflected in the 2024 plan), where there were not enough workers, to the market in 2025, where there are fewer job openings.

A. The 2023 Baseline The economic analysis for the 2024 WIOA Combined State Plan described a labor market defined by high demand from employers and a limited number of available workers. While initial data suggested a full recovery of non-farm jobs by March 2023, later updates by the Bureau of Labor Statistics (BLS) changed this timeline. The revised data indicates that payroll job growth in Massachusetts was slower than national trends throughout 2022 and 2023 (CES).

Despite lower employment counts, the updates confirm the labor market was "tight" in 2023 because there were few available workers. Labor market tightness peaked in April 2023 when there were 2.4 job openings for each available worker. By December 2023, there were still 1.6 job openings for each available working, indicating a high level of competition for talent (JOLTS).

Metric	Dec 2023	August 2025	Change	Calculation Method
Unemployment Rate (%)	3.7	4.8	↑1.1 pp	LAUS unemployed ÷ LAUS labor force × 100
Labor Force	3,853,000	3,964,000	↑111 k	LAUS civilian labor force (employed + unemployed)
Employment - Payroll/CES	3,728,000	3,724,000	↓4 k	CES total nonfarm payroll employment
Employment - Resident/LAUS	3,710,000	3,774,000	↑64 k	LAUS resident employment from household survey
Total Unemployed Population	143,000	189,000	↑46 k	LAUS resident unemployment from household survey
Labor Market Tightness (Openings/Unemployed)	1.6	0.9	↓0.7	JOLTS job openings ÷ LAUS unemployed persons

B. The 2025 Labor Market Shift Economic data from 2024 and 2025 indicates a change in the balance between labor supply and employer demand.

- **Supply-Side Shift:** The worker shortage seen in 2022 and 2023 has eased. The number of available workers (labor supply) grew by over 55,000 individuals in 2024, passing pre-pandemic levels (LAUS).
- **Demand-Side Shift:** As the number of workers increased, demand from employers cooled. The ratio of job openings per unemployed person dropped from 1.7 to 0.9 between early 2024 and March 2025 (JOLTS).

C. Strategic Implication The change from 2.4 openings per unemployed person (2023) to 0.9 (2025) signals a new challenge for the workforce system. The primary issue has shifted from a lack of workers to a decrease in the number of job openings available for the growing workforce.

Statewide Labor Market Trends

While the broader economy has shifted, specific labor market numbers show a difference between what employers report and what residents report. This section examines the gap between payroll data (jobs at businesses) and household data (employed residents) and how this affects unemployment.

A. The Employer vs. Resident Gap In 2024, the two main ways of tracking employment moved in different directions. This highlights a change in how residents are employed.

- **Payroll Data:** Counts of jobs physically located at Massachusetts businesses remained nearly flat (CES).
- **Resident Data:** Counts of employed residents grew by 45,000 (LAUS).

Two factors may explain this difference: a 0.8% increase in self-employment (CPS) and an increase in remote work where residents are employed by companies outside of Massachusetts. Because remote work remains common, the number of employed residents can grow even if Massachusetts-based employers are not creating new jobs.

B. Increasing Time to Find Work

While resident employment did grow (as noted above), it did not keep pace with the rapid expansion of the labor force. Because Massachusetts-based businesses (the largest source of jobs) were not expanding, the economy could not fully absorb the influx of new workers. This bottleneck has changed the job search environment.

- **Unemployment Rate:** The rate rose from 3.7% in 2023 to 4.8% by mid-2025, which is higher than the national average (LAUS).
- **UI Exhaustion:** The percentage of people who used all their unemployment benefits without finding work rose from 28% to 40% (ETA).
- **Recent Graduates:** The unemployment rate for bachelor's degree holders (ages 22–27) surpassed 6% (CPS) versus 3.8% in 2023

These numbers indicate that finding a job takes more time for unemployed individuals and new workers now than it did in 2023.

Industry Analysis

Shift from Professional Services to Health Care

The cooling of the state economy is not happening evenly across all sectors. Instead, it is driven by a shift in which industries are growing. This section analyzes the move from a recovery led by technical services and construction to one recently supported by health care and logistics.

A. The 2019–2023 Baseline: Uneven Recovery Revised data for the period between late 2019 and late 2023 show that employment recovery was driven by specific industries, while others lagged or lost jobs.

- **Growth Sectors:** The recovery was led by Professional, Scientific, and Technical Services, which added 25,000 jobs (+7.1%), and Construction, which grew by 8,000 jobs

(+4.4%) (QCEW). Additionally, Transportation and Warehousing expanded, adding 4,000 jobs (+3.1%) (QCEW).

- **Lagging and Contracting Sectors:** In contrast, the Health Care and Social Assistance sector remained flat (-0.1%) (QCEW). The Accommodation and Food Services sector remained 19,000 jobs (-5.9%) below 2019 levels. Similarly, Manufacturing experienced a long-term decline, losing 8,000 jobs (-3.3%) prior to 2024 (QCEW).

B. The 2024 Industry Shift Employment data for late 2023 through late 2024 shows a change in the trends from the previous four years. Sectors that previously drove growth began to lose jobs, while Health Care and Transportation became significant sources of employment growth.

- **Health Care Expansion:** After four years of slow recovery, Health Care and Social Assistance added 11,000 jobs (+1.7%) in 2024 (QCEW). Growth was concentrated in community-based areas, such as Residential Intellectual and Developmental Disability Facilities (+8.9%) and Nursing Care Facilities (+4.0%) (QCEW).
- **Continued Growth in Logistics:** Transportation and Warehousing continued to grow, adding 3,000 jobs (+2.3%) in 2024 (QCEW).
- **Stabilization in Hospitality:** The Accommodation and Food Services sector stabilized in 2024. Employment remained flat (+0.1%), meaning job losses stopped, but the sector did not return to pre-pandemic levels (QCEW).

C. Sectors Losing Jobs The 2024 period is defined by job losses in sectors that had been stable or growing in previous years.

- **Professional, Scientific, and Technical Services:** Following gains in the prior period, this sector lost 3,000 jobs (-0.7%) in 2024 (QCEW). Notably, the Computer Systems Design industry declined by 6.5%, reflecting a correction in technology hiring (QCEW).
- **Construction:** Associated with high interest rates and slowing residential development, the Construction sector shifted from growth to decline, losing 2,000 jobs (-1.3%) in 2024 (QCEW).
- **Manufacturing:** The decline observed since 2019 continued in 2024, with the sector losing an additional 6,000 jobs (-2.5%) (QCEW). Losses were concentrated in advanced subsectors, including Semiconductor Manufacturing (-5.6%) and Navigational Instruments (-5.6%) (QCEW).

D. Summary of Long-Term Change (5-Year Trend) The total impact of these shifts (2019–2024) highlights the changing makeup of the state economy:

- **Professional Services** retains a net gain of 23,000 jobs (+6.4%) despite recent cooling (QCEW).
- **Health Care** has returned to a net positive position (+1.6%), with a total gain of 11,000 jobs over the five-year period (QCEW).
- **Construction** retains a net gain of 5,000 jobs (+3.0%) despite the job losses in 2024 (QCEW).
- **Manufacturing** has lost a total of 14,000 jobs (-5.7%) since 2019 (QCEW).

Regional Labor Market Trends

A. Overview: Regional Differences The industry shifts described above affect different parts of the state in different ways. This section outlines how the mix of industries in each region has protected some areas while exposing others to job losses.

The 2024 WIOA plan described an "uneven recovery" where the Greater Boston region recovered jobs faster than other areas. By 2024, these differences turned into distinct regional

trends driven by the industry shifts described in Section III. While the statewide labor market cooled, the impact varied based on local industries and population changes.

B. Southeast Region: Labor Market Stability The Southeast region (including South Shore, Bristol County, Brockton, and Greater New Bedford WDAs) showed stability in 2024. This region experienced the highest rate of labor force growth in the state, with the resident workforce growing by approximately 3% (LAUS).

Despite the statewide hiring slowdown, the unemployment rate in this region increased by 0.4 percentage points, a smaller increase than in the Northeast or Pioneer Valley (LAUS). This stability was supported by a change in the types of jobs available. Job losses in Manufacturing and Employment Services were balanced by growth in Health Care and Social Assistance. Notably, while hospital employment was flat in Greater Boston, the South Shore and Greater New Bedford areas saw growth of over 6% in General Medical and Surgical Hospitals (QCEW).

C. Northeast and Pioneer Valley: Impact of Industry Job Losses The decline in the Manufacturing sector had a focused impact on the Northeast and Pioneer Valley regions.

- **Northeast Region:** The Greater Lowell and Lower Merrimack Valley areas have a high concentration of manufacturing employment, accounting for 15% of total jobs, compared to 6% statewide (QCEW). Consequently, the statewide decline in advanced manufacturing resulted in the loss of over 800 manufacturing jobs across these two areas. This contributed to an increase in the unemployment rate of 0.7 percentage points in Greater Lowell and 0.6 percentage points in the Lower Merrimack Valley (LAUS).
- **Pioneer Valley:** Hampden County experienced job losses in two core sectors at the same time. Manufacturing employment declined by approximately 500 jobs. Unlike the Southeast, this region did not see balancing growth in health care; the Health Care and Social Assistance sector in Hampden County lost nearly 900 jobs (-1.6%) (QCEW). Because health care accounts for one in four jobs in the region, these combined losses contributed to a 0.6 percentage point increase in the unemployment rate (LAUS).

D. The Berkshires: Persistent Worker Shortages The labor market in the Berkshire region differed from the statewide trend. While other regions saw rising unemployment due to fewer jobs and a growing workforce, the Berkshires continued to experience a shortage of workers.

The resident workforce in the Berkshires grew by 1% in 2024, the slowest rate of any region (LAUS). Total payroll employment declined by 1% (-650 jobs), driven by losses in the Accommodation and Food Services sector (QCEW). Unlike regions where job losses were driven by a lack of demand, data indicates there is still unmet demand in the Berkshires. Job postings for Health Care and Social Assistance positions have tripled since 2019 and remained high in 2024, suggesting that the region is limited by a lack of available workers rather than a lack of open positions (Lightcast).

Workforce Demographics

Uneven Outcomes of the Market Shift

A. Overview

While the statewide workforce has grown, outcomes vary by demographic group. Data based on 12-month averages ending in August 2025 highlights distinct trends in who is entering the workforce and who is successfully finding employment compared to the 2023 baseline.

B. Asian Residents

- **High Participation:** The Labor Force Participation Rate (LFPR) reached 70.3%, 3.2 percentage points above the 2023 baseline.
- **Employment Growth:** This participation converted into employment, with the number of employed Asian residents increasing by 44,873.
- **Unemployment:** Consequently, the unemployment rate remained stable at 4.0%, aligning closely with the statewide average.

C. Hispanic and Latino Residents

- **Participation:** The participation rate rose to 66.9% (+4.1 pp).
- **Decline in Employment:** Total employment declined by roughly 6,600 individuals.
- **Rising Unemployment:** Because labor supply increased while hiring contracted, the unemployment rate increased from 4.7% to 6.5%.

D. Black and African American Residents

- **Job Growth:** The number of employed Black residents increased by approximately 12,800 (+4.7%).
- **Persistent Unemployment:** Despite these gains, the unemployment rate rose to 7.0%. This suggests that while hiring is happening, it is not fast enough to absorb all new entrants.
- **Pandemic Recovery:** A long-term gap remains; the participation rate is still 4.5 percentage points below 2019 levels.

E. White Residents

- **Steady Growth:** The number of employed White residents increased by approximately 95,000 since 2023.
- **Low Unemployment:** The unemployment rate stands at 3.7%.
- **Participation:** The participation rate ticked up to 66.3% (+1.0 pp).

F. Foreign-Born and Domestic-Born Residents Analysis of the labor market by birth status reveals different trends between the recent WIOA plan period (2023–2025) and the long-term post-pandemic recovery (2019–2025).

- **Labor Force Participation:** Foreign-born residents participate in the workforce at a higher rate than domestic-born residents. As of August 2025, the LFPR for foreign-born residents was 70.1%, compared to 65.8% for domestic-born residents (CPS).
- **Employment Differences (2023–2025):** During the WIOA plan period, job growth was concentrated among domestic-born workers. Domestic-born employment increased by approximately 160,000. In contrast, the number of employed foreign-born residents declined by nearly 30,000 (-29,619) (CPS).
- **Long-Term Structural Shift (2019–2025):** A comparison with pre-pandemic data indicates that foreign-born workers have been the main driver of long-term growth. Since December 2019, foreign-born employment has increased by 75,000, while domestic-born employment remains 45,000 below 2019 levels (CPS).

G. Youth (Ages 16–24) and Individuals with Disabilities

- **Youth:** The youth labor market shows rising unemployment. The unemployment rate rose to 9.4% for the period ending August 2025, an increase of 2.6 percentage points

from the 2023 baseline (CPS). While participation increased (LFPR +4.0 pp), employment outcomes lagged, indicating young workers face increasing difficulty finding jobs in the current market.

- **Individuals with Disabilities:** This group recorded an increase in workforce engagement. The LFPR rose to 37.5% (up 5.3 pp from baseline), and the percentage of the population that is employed increased to 34.3% (CPS). While the unemployment rate stands at 8.5%, this is driven by more people entering the workforce rather than job losses.

Strategic Implications

Aligning Systems with Market Conditions

The economic and demographic shifts outlined in this report require an adjustment in workforce development priorities. This final section translates the data into key strategies for the WIOA system, focusing on aligning training resources with the current job market.

A. From Recruitment to Re-employment: The drop in the job openings ratio (from 2.4 to 0.9) indicates a strategic shift (JOLTS). In 2023, the system focused on recruitment to meet unmet demand. In the current environment—where there are fewer jobs for the number of applicants—the data supports a focus on re-employment services, career guidance, and job placement for workers who have been unemployed for extended periods.

B. Strategic Sector Alignment

- **Health Care:** While the sector has recovered, future growth may be uneven due to the evolving policy landscape. Despite this macro-level uncertainty, persistent operational shortages for LPNs and CNAs present a viable, if shifting, target for WIOA credentialing investments in the short term.
- **Innovation Economy:** Despite short-term job losses in Technology, Manufacturing, and Biotech (QCEW), Massachusetts has invested in these sectors and additionally prioritizes Applied AI via the Mass Leads Act. Workforce strategies in these areas focus on maintaining talent pipelines for projected future demand.
- **Construction:** While the Construction sector lost jobs (-1.3%) in 2024 due to market conditions (QCEW), the Affordable Homes Act aims to generate future demand for construction and related labor. This aligns with the expansion of Registered Apprenticeship programs to meet long-term production goals.

B. Integration of New Entrants The difference between employment growth and unemployment rates points to challenges in connecting people to jobs. This is particularly evident for Hispanic residents (where participation has grown faster than hiring) and Black residents (where unemployment remains nearly double the white rate) (CPS). Using this labor supply effectively involves dedicating resources to English for Speakers of Other Languages (ESOL), credential translation, and skills validation to reduce the time it takes to move from entering the workforce to finding a job.

The labor market has inverted

Job postings per unemployed

January 2009 - August 2025



Source: BLS and DER calculations



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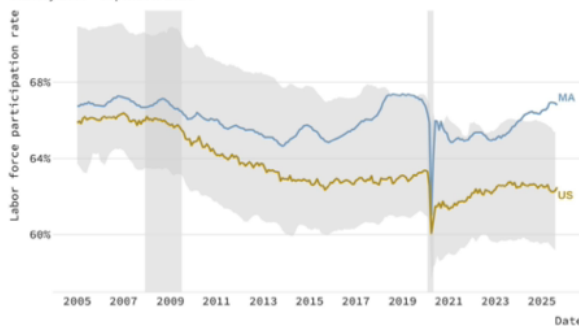
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Divergence in labor supply and demand

The labor force grew by 55,000 between 2023 and 2024

Labor force participation rate

January 2005 - September 2025

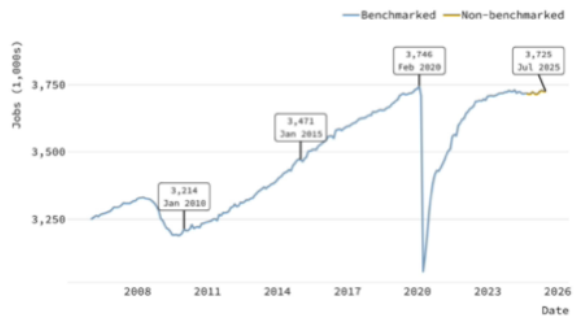


Source: Local Area Unemployment Statistics (MA), Current Population Survey (US). The gray ribbon represents the 80th percentile and 20th percentile LFPR across all states.

Non-farm jobs have been flat since 2022

Total non-farm jobs estimate

MA Statewide: January 2006 - July 2025



Source: CES Seasonally Adjusted Estimates



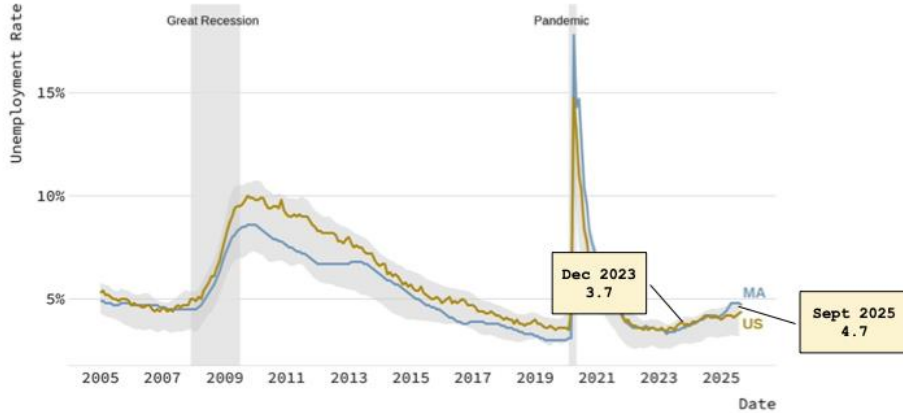
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It is harder to find a job today

Unemployment rate

January 2005 - September 2025



Source: Local Area Unemployment Statistics (MA), Current Population Survey (US). The gray ribbon represents the 80th percentile and 20th percentile unemployment rates across all states.



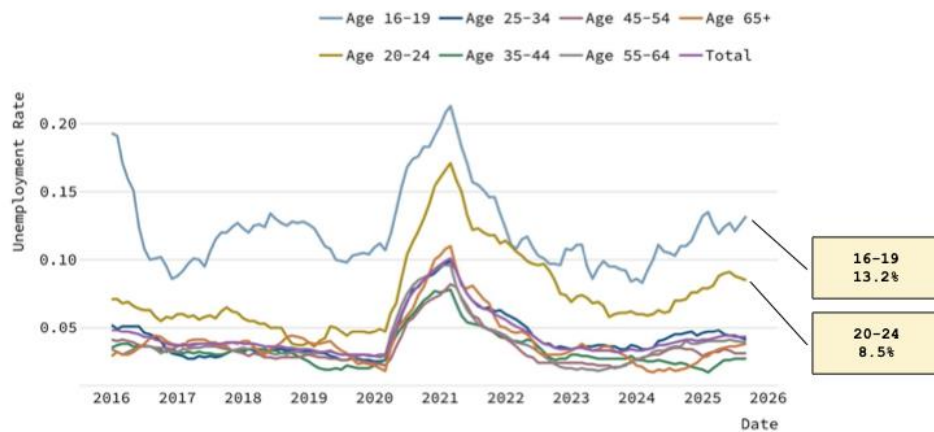
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Young workers have been especially impacted

Unemployment rate by age

January 2016 - September 2025



Source: Current Population Survey. 12 month rolling average.



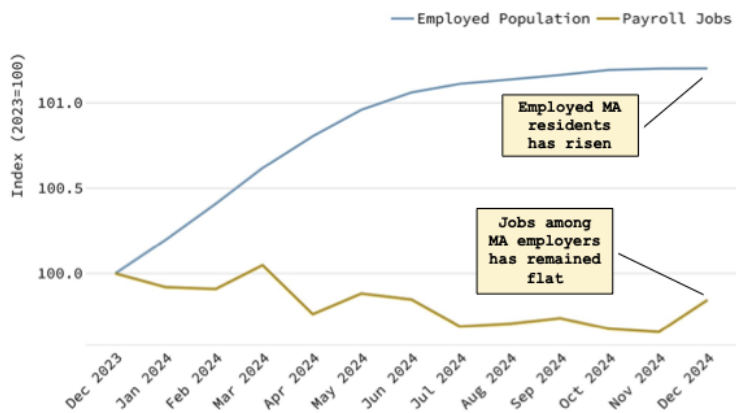
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Disconnect: Residents vs Employers

Employed Population and Payroll Jobs in MA

2023-2024 | 100 = Dec 2023



Source: BLS CES and LAUS data

Potential Explanations:

- Increase in self employment (up 1% in 2024 compared to 2023)
- Increase in remote work for out-of-state firms.



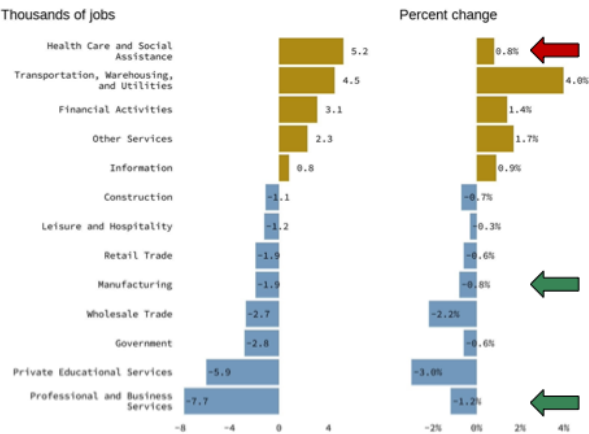
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The drivers of job growth have shifted

Year-over-year change in employment

Massachusetts | September 2025



Source: Current Employment Statistics. Seasonally Adjusted.

Insight:

- Sectors which the data showed were growing during the planning period have been declining recently.
- Lagging sectors during the planning period are growing.

← Growing during planning period

← Lagging during planning period

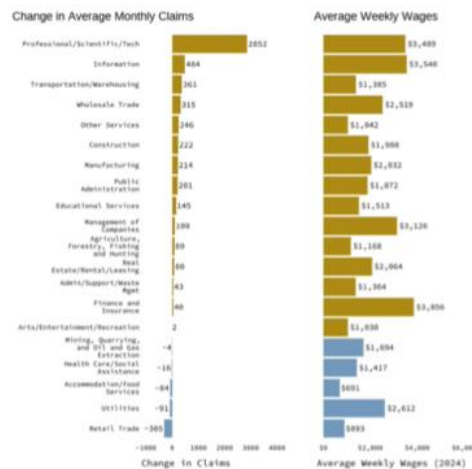


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More highly educated job seekers

Change in Average Monthly UI Claims and Weekly Wages by Sector
Massachusetts | 2019 vs 2024



Source: Employment and Training Administration (ETA 203), Quarterly Census of Employment and Wages. Average weekly wages from 2024.

Impact:

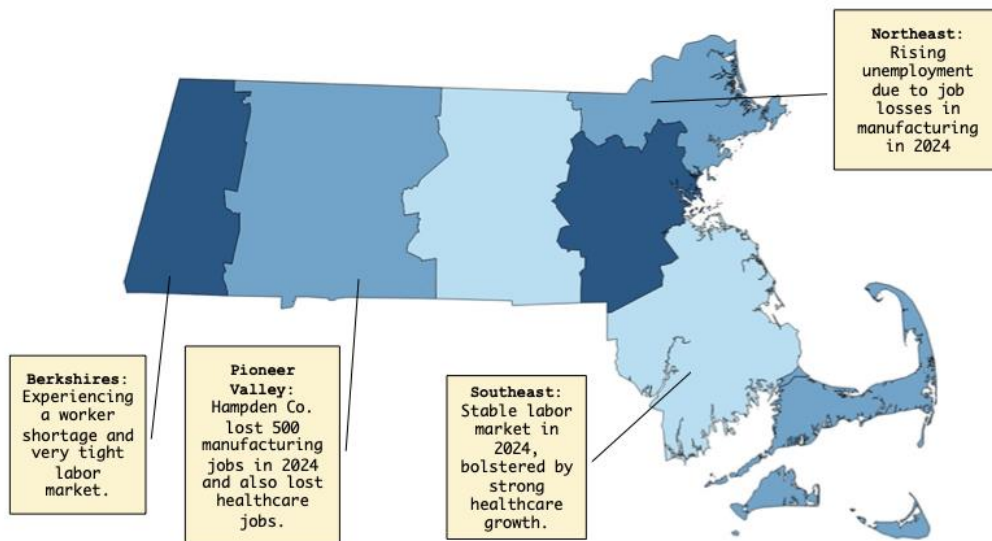
- The slowdown in sectors like tech and biotech has meant a surge in highly educated, high-earning job seekers in the UI system.
- In 2024, There were an average of 2,800 more UI claimants per month from the Professional, Scientific, and Technical Services than in 2019.



12/15/2025

8

Economic trends vary across regions



12/15/2025

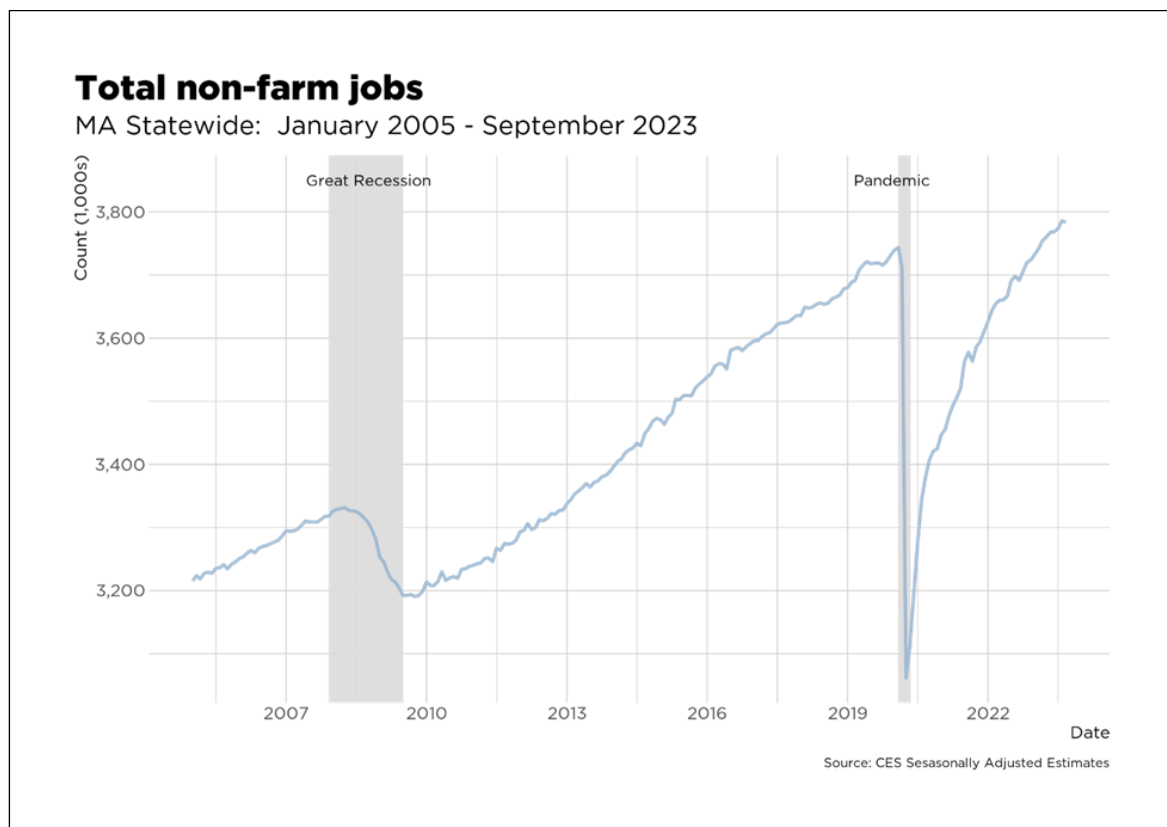
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The economic shockwave triggered by the COVID-19 pandemic was swift and brutal, one of the most severe in recorded history. In a single month, Massachusetts saw the loss of nearly 650,000 jobs, a figure that dwarfs the job losses during the Great Recession in 2008-09 by nearly six times (*Figure 1*).

Yet, in contrast to the Great Recession, the recovery of employment has been remarkably rapid. By March 2023, a mere three years after the pandemic's onset, the total number of jobs in the Commonwealth had rebounded to pre-pandemic levels. This recovery was

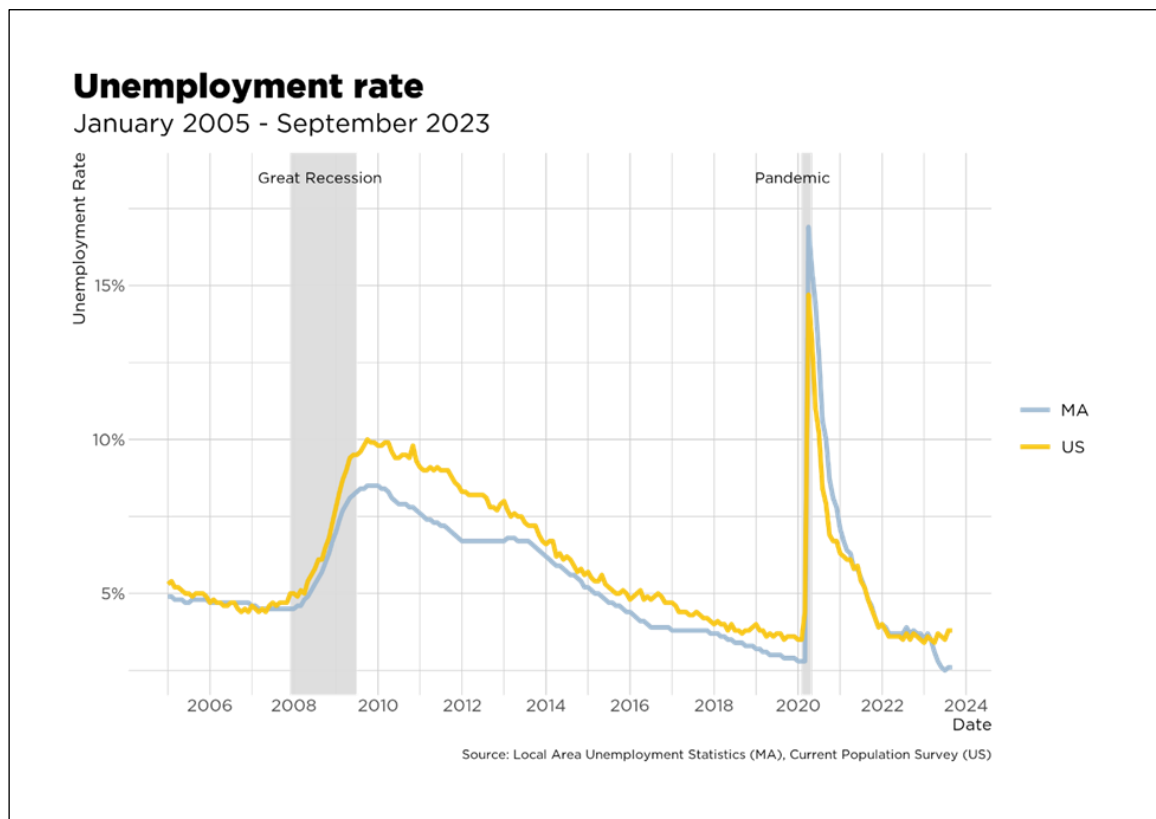
significantly faster than the nearly five-year period it took for the state's economy to recover to pre-Great Recession employment levels.

Figure 1



The story of unemployment in Massachusetts mirrors this narrative. The rate escalated from a historically low 2.8% in March 2020 to a peak of 15.5% in May 2020, surpassing the level experienced during the Great Recession (*Figure 2*). However, by July 2023, three years after the unemployment peak, the rate reached a historically low level of 2.5%, with Massachusetts experiencing the one of the largest drops in the unemployment rate of any state in the US. This recovery was much quicker than the nearly eight years it took for the unemployment rate to return to its pre-Great Recession level low (January 2008 – November 2015).

Figure 2



Focusing on the rapid recovery of these key economic indicators, like jobs or the unemployment rate, can give the impression that the economy has returned to a “normal” pre-pandemic state. Yet, an aging population, a period of reduced immigration, and deaths of prime age workers from COVID-19 have put pressure on the labor market that diverge from pre-pandemic conditions. Additionally, structural shifts like the increase in remote work and changing worker preferences present both new opportunities and challenges for workers and employers in Massachusetts.

The outcome of these dynamics has been an increasingly tight labor market through 2022 and 2023. This tightening is illustrated through the divergence in jobs and the labor force. Compared to December 2019, there are now roughly 113,000 fewer people employed and in the labor force, but there are 53,000 more jobs (Figure 3). As a result, there are fewer people available to fill each new job opening in the economy.

Figure 3

Post-pandemic Massachusetts labor market dynamics

Between December 2019 and September 2023...



Source: Bureau of Labor Statistics

These dynamics show that the return of record employment levels and historically low unemployment rates does not necessarily mean a return to pre-pandemic conditions. The labor market in Massachusetts has become increasingly tight over the past two years. This dynamic has created opportunities and challenges for workers and employers. For workers, wages have risen, and labor market outcomes have improved for some groups that have been traditionally marginalized in the labor force. For employers, the tight labor market has in some cases slowed the pace of recovering employment to pre-pandemic levels and contributed to rising costs.

This analysis delves deeper into some of the most significant changes that are likely to impact the future economy of the Commonwealth, exploring the following trends:

- **Growth and Investment Opportunities Across Sectors:** The professional and business services sector in Massachusetts has seen significant growth since 2019. This surge is primarily driven by the strength of the biotech sector, the commercialization of artificial intelligence (AI), and the rise of remote work. Additionally, sectors such as advanced manufacturing, life sciences, health care, and clean energy have largely withstood the impacts of the pandemic, offering employment opportunities across various skill levels.
- **Challenges in the Labor Market:** Certain sectors are experiencing a tight labor market, notably health care and educational services. This tightening presents a challenge to achieving full employment recovery in these sectors. Most other sectors exhibit a ratio of job postings to unemployed individuals equal to or lower than pre-pandemic levels.
- **The Economic Impact of the Health Care Sector:** The health care sector plays a crucial role in Massachusetts' economy, meaning that any shifts in this sector could have considerable ramifications. The tight labor market has slowed job growth in this sector, impeding full employment recovery in regions outside of Boston.
- **Future Demand:** Looking ahead, annual job openings may provide insight into future occupational demands. Many of the top openings are in lower-wage jobs impacted by the pandemic, like food services, highlighting significant turnover. However, openings are also notable in high-demand occupations requiring specialized skills,

including management, health care, and STEM fields. This points to potential skills gaps as labor force exits outpace new entrants.

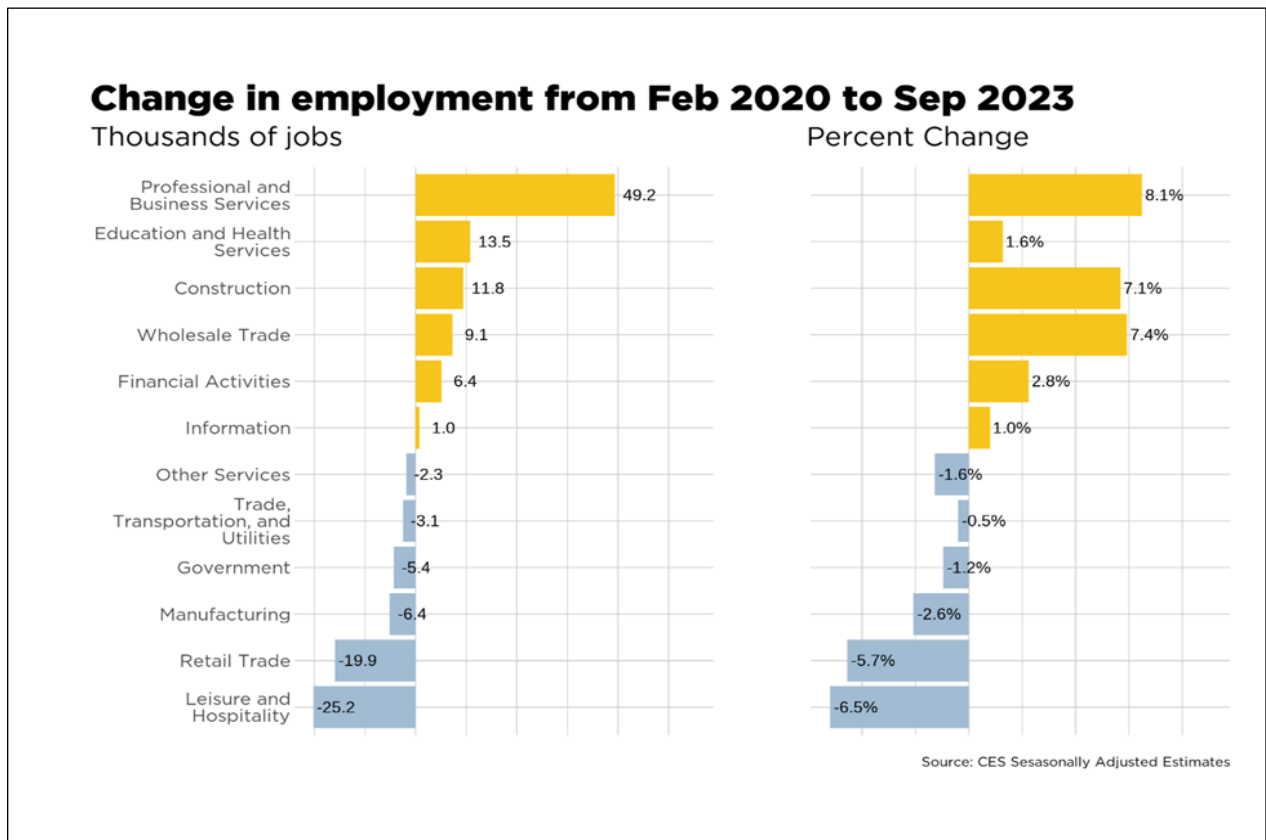
- **Regional Variations in Pandemic Recovery:** The impact of the pandemic on employment has been significant across Massachusetts' 16 Workforce Development Areas (WDAs), with recovery patterns varying notably. Boston, Central, and Metro North WDAs are showing visible recovery, yet the labor force and employed populations across all WDAs remain below pre-pandemic levels. These differences point to the influence of the industry mix and local conditions on regional economic changes, suggesting a need for region-specific workforce development strategies.
- **Workforce Diversity and Disparity:** Massachusetts' workforce is increasingly diverse, with Black workers particularly benefiting from the current labor market conditions. Despite this progress, notable disparities persist among different racial and ethnic groups in terms of employment and wage growth. The effects of the pandemic have also varied, significantly impacting demographic groups like young workers (aged 16-24) and those aged 65+. These observations call for strategies to encourage re-entry into the workforce and considerations around retirement. Moreover, foreign-born workers are playing an increasingly critical role in Massachusetts' workforce, emphasizing the need to address barriers like English proficiency and legal work status.
- **Education and Employment:** While the economic recovery has largely favored individuals with a bachelor's degree or higher, approximately two-thirds of jobs in the Massachusetts economy do not require such a degree. Notably, there is an observed wage growth for jobs requiring less formal education, suggesting a demand for these roles.

Post-Pandemic Industry Dynamics

While the broader employment landscape seems to have rebounded to pre-pandemic levels, and unemployment rates have hit record lows, the recovery has been far from uniform across industries. The pandemic has acted as a catalyst, driving significant transformations within industries. These changes have been influenced by a variety of factors, including the widespread adoption of remote work, labor market tightness in certain sectors, and the different effects of the pandemic on different industries.

Several industries have seen significant growth in employment compared to pre-pandemic levels, as of September 2023. These include wholesale trade (+7.4%), construction (+7.1%), and professional and business services (+8.1%). The professional and business services sector stands out as a burgeoning sector, adding nearly 50,000 new jobs in Massachusetts since February 2020 (Figure 4).

Figure 4



The growth of the professional and business services sector, primarily driven by professional, scientific, and technical services, can be attributed to several factors:

- Strong growth in the biotechnology sector:** Massachusetts has a strong biotechnology sector that has shown significant growth in recent years, despite some challenges posed by the pandemic. According to the Massachusetts Biotechnology Council, biopharma employment in Massachusetts grew by 34,000 jobs between 2019 and 2022, and the state received 26 percent of all venture capital investment nationally. Additionally, the biotechnology sector's contribution to gross state product increased by 48% from 2019 to 2022. This growth boosted employment in the Research and Development in the Physical, Engineering, and Life Sciences industry, which added 18,868 jobs between 2019 and 2022.
- Emerging commercial uses of AI technologies:** The period since 2019 has seen the growing emergence of commercial AI technologies, particularly in the life sciences sector. Firms in the AI space are predominantly in the professional, scientific, and technical services sector ([brookings.edu/articles/understanding-artificial-intelligence-spending-by-the-u-s-federal-government/](https://www.brookings.edu/articles/understanding-artificial-intelligence-spending-by-the-u-s-federal-government/)). Massachusetts, a global leader in AI technology, with Boston ranking 3rd globally for the most diverse AI talent pool (HBR), has seen new business opportunities for its companies and workers as AI commercialization increases.

- **The rise of remote work:** Jobs in the professional, scientific, and technical services sector were already conducive to remote work prior to the pandemic. This allowed for a smooth transition to a largely remote work environment during the pandemic. In 2021, nearly 50% of professional and business services workers nationally worked from home at least part of the time, compared to 22% overall (bls.gov/opub/mlr/2022/article/telework-during-the-covid-19-pandemic.htm).

In stark contrast, the retail and accommodation and food services sectors experienced significant job losses during the pandemic and have been slow to recover. As of May 2023, employment in the retail sector was down 5.4% compared to February 2020, and the accommodation and food services sector was down 7.4%. These two sectors represent a loss of more than 47,000 jobs. Several factors have contributed to these dynamics:

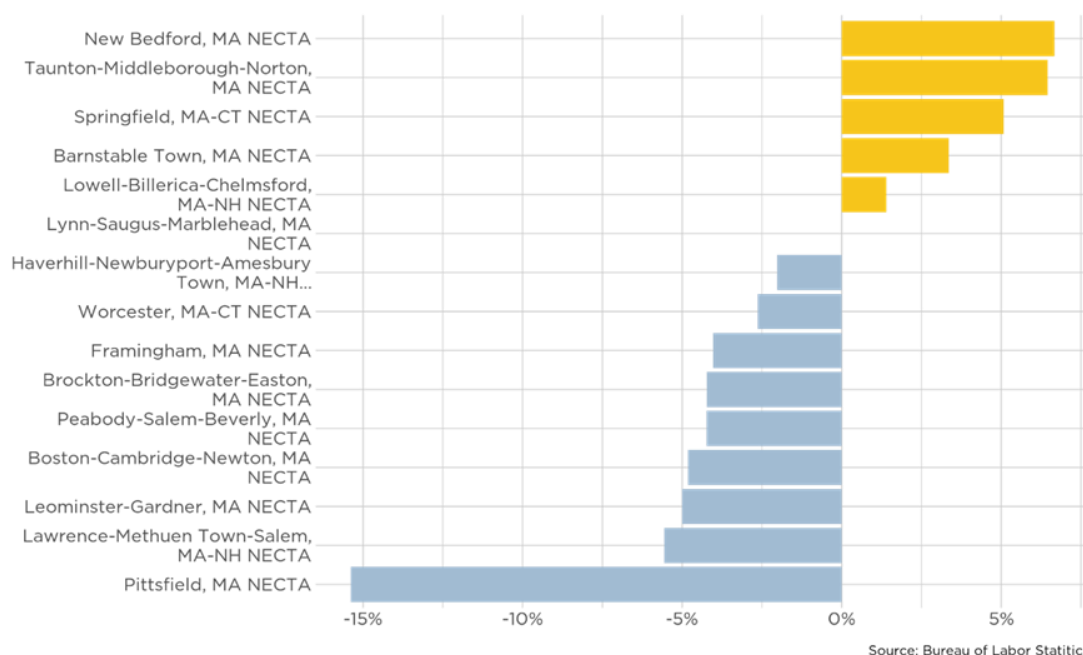
- **Pandemic shutdowns:** The accommodation and food services sector, as well as the retail sector, were heavily impacted by the shutdowns and social distancing measures implemented during the pandemic. These measures led to temporary closures of many businesses and reduced customer traffic, resulting in significant job losses.
- **Decline in tourism and business travel:** The pandemic led to a sharp decline in both household and business travel. This had a direct impact on the accommodation and food services sector, which relies heavily on tourism and business travel for revenue. With fewer people traveling, the demand for these services decreased, leading to job losses in the sector.
- **Remote work decreasing spending in business districts:** The shift to remote work meant fewer people commuting to business districts, leading to a decrease in spending on retail and food services in these areas. This decline in foot traffic and spending further exacerbated job losses in these sectors.

The impact on retail and accommodation and food services was widespread across the state—particularly areas with strong travel and tourism economies. By August 2023, only 6 of 15 New England city and town areas (NECTA) in the state had as much employment in the leisure and hospitality sector as August 2019 (Figure 5). In terms of percent change in employment, the Pittsfield, MA NECTA stands out as having employment levels 15% lower in August 2023 compared to August 2019.

Figure 5

Change in leisure & hospitality employment

Aug 2019 to Aug 2023

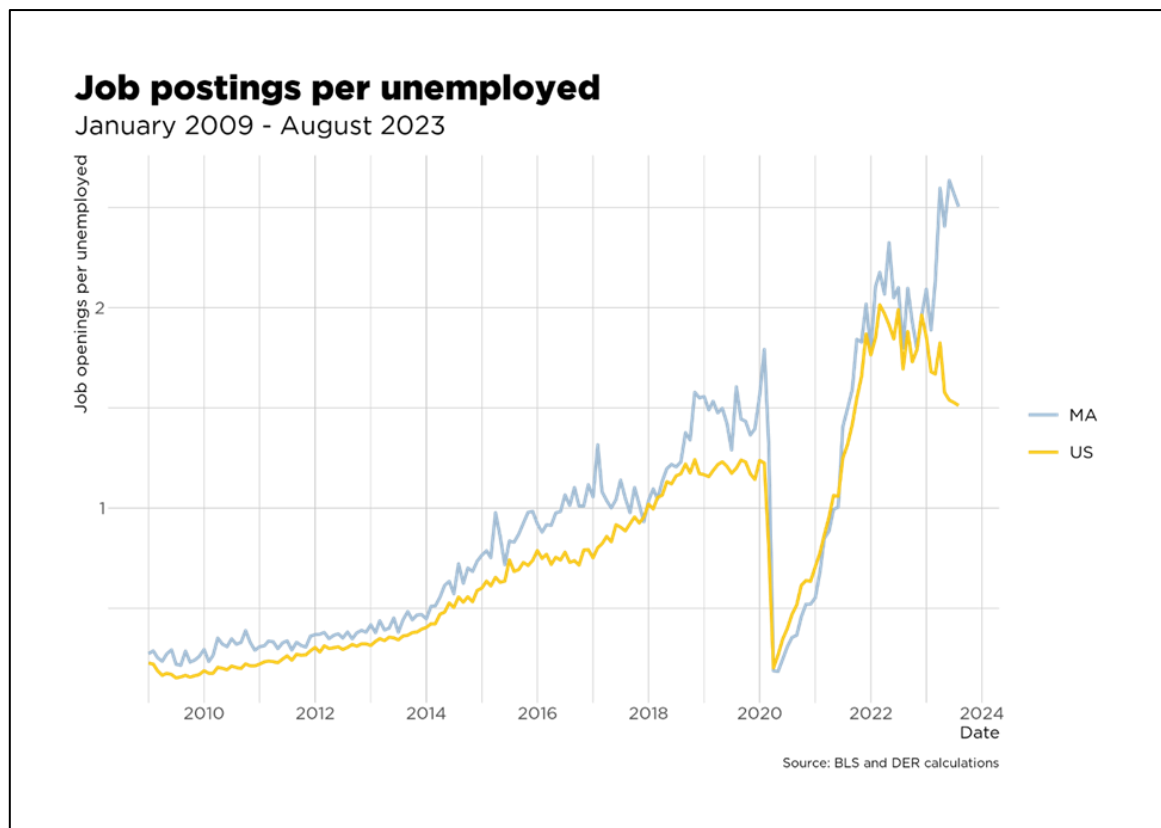


From the perspective total number of jobs lost, the impact was particularly severe in Boston. Between 2019 and 2022, Suffolk County lost 15% of its retail and accommodation and food services employment, compared to a decline of 7% statewide. A single Boston zip code—the area roughly representing Back Bay—lost more than 3,000 retail and accommodation and food services jobs between 2019 and 2022 and accounted for more than 6% of the total state losses. This area’s position as an area catering to commuters, tourists, and business travelers made it particularly vulnerable to the pandemic period dynamics described above.

The Pandemic and the Tightening Labor Market

A notable dynamic that unfolded during the pandemic was the intensifying labor market tightness. As previously mentioned, the labor force contracted and has remained below pre-pandemic levels, even as the number of jobs in the state has rebounded. This tightening is reflected in the number of job openings per unemployed person, a metric that has reached historic levels in the post-pandemic period. In June 2023, Massachusetts hit an unprecedented peak, with 2.6 job openings available for every unemployed worker (Figure 6). By August 2023, this ratio remained high at 2.5 job openings per unemployed worker, surpassing the national average of 1.5.

Figure 6



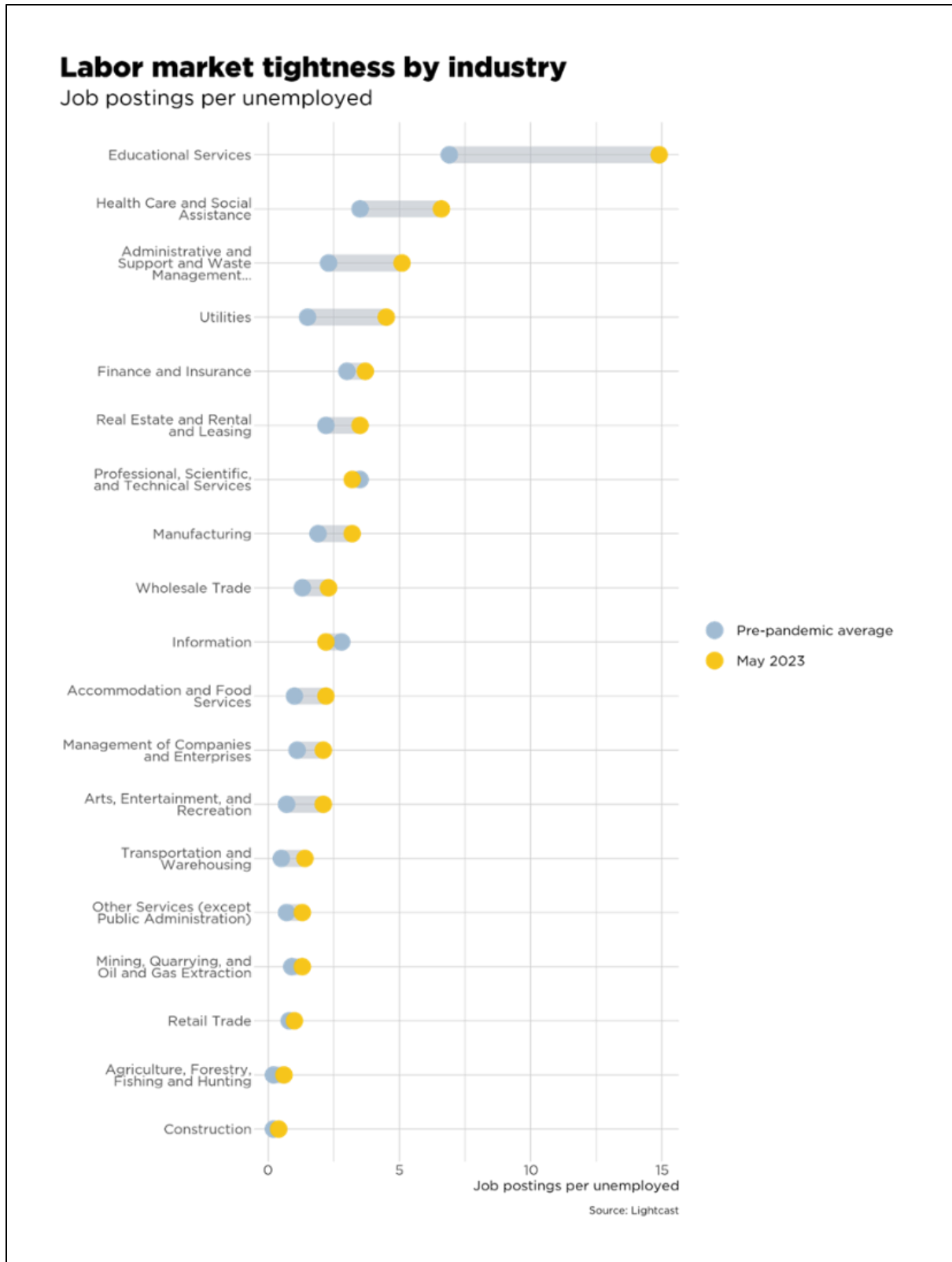
For most sectors, the number of job postings per unemployed person within the sector have returned to pre-pandemic levels. In some sectors, there were fewer job postings per unemployed person in May 2023 than there were prior to the pandemic, particularly in information and professional, scientific, and technical services (Figure 7). These sectors are notable because they are among the industries with the highest rates of remote working. This may allow firms in these sectors to expand their potential labor market beyond Massachusetts, making them less sensitive to local labor market conditions. At the same time, it could mean that jobs growth in these sectors may not translate to employment growth in Massachusetts.

While almost every sector was experiencing a tight labor market with more than one job posting per unemployed person, the health care and educational services sectors have been particularly impacted. These sectors share several characteristics that shed light on the high degree of labor market tightness experienced in the post-pandemic period:

- **In-person work:** Both sectors generally require in-person work. With the pandemic sparking a surge in demand for remote work options, some workers may be opting to switch careers or pursue opportunities in fields that offer remote work. This shift could be contributing to the labor shortages in these sectors.
- **Aging workforce:** Even before the pandemic, both sectors had workforces that were older than the overall workforce in Massachusetts. In 2019, 28% of the educational services workforce and 27% of the health care workforce were 55 years old or older, compared to 25% of the overall workforce (Quarterly Workforce Indicators). As these workers reach retirement age, the sectors may be struggling to replace them, further exacerbating labor market tightness.

- **High levels of credentialing:** The health care and educational services sectors are among the industries with the highest share of workers with a bachelor's degree or higher. Additionally, many jobs within the sectors require specialized licenses or credentials. This dynamic can slow labor supply responses to increased demand, as workers are required to complete specialized degree or training programs to qualify for employment.
- **Burnout:** The pandemic placed exceptional demands on workers in both sectors, leading to high levels of burnout. Consequently, the average number of workers per quarter leaving a job in the health care and educational services sector for a job in another sector rose from 11,000 per quarter from 2017 to 2019 to 14,000 per quarter from Q2 2021 (when the vaccine became widely available) to Q2 2022 (U.S. Census Job-to- Job Flows). Notably, there was a 51% increase in the rate of workers switching from jobs in health care and educational services to jobs in professional, scientific, and technical services.

Figure 7



The post-pandemic employment landscape in Massachusetts has showcased both growth and challenges across industries. While the professional and business services sector has

experienced significant employment growth, driven by factors such as the strength of the biotechnology sector, the rise of AI technologies, and the emergence of remote work opportunities, the retail and accommodation and food services sectors have struggled to recover, facing job losses due to pandemic shutdowns, declines in tourism and business travel, and decreased spending in business districts.

On the surface, headline employment indicators paint a picture of resilience and recovery. But a closer look reveals a more complex narrative of growth, stagnation, and transformation unfolding across industries.

While sectors like professional services and construction have thrived, adding thousands of jobs, others still languish. Retail and hospitality employment levels lag, struggling to rebound from closures and loss of tourism. This bifurcated recovery stems from disparate pandemic impacts. Remote work enabled industries like tech to flourish, expanding access to talent. But sectors relying on travel and commuting were negatively impacted.

Beyond direct effects, the pandemic also sparked structural changes still rippling through industries. Most notably, it dramatically expanded remote work, allowing some sectors to tap wider labor pools. This could limit how job growth translates to local employment. Meanwhile, sectors requiring in-person work faced intensifying labor shortages as workers sought flexibility.

Health care and education exemplify these challenges. With aging workforces and extensive credentialing requirements, pandemic-driven burnout and departures produced acute hiring strains. Regional disparities also emerged, as areas leaning on devastated tourism industries fell behind.

In summary, while some industries rebounded strongly, the landscape remains reshaped. As complex dynamics continue unfolding, tailored workforce strategies responsive to industry-specific labor markets will be essential for recovery. Grasping both lingering pandemic impacts and emerging structural changes will help align skills training and career pathways to post-pandemic realities.

The COVID-19 pandemic triggered economic shocks across Massachusetts' 16 Workforce Development Areas (WDAs) including significant job losses, a notable increase in the unemployment rate, and a substantial decline in both the labor force and the employed population. However, as of April 2023, the labor markets within these WDAs have made progress in their recovery, although to varying degrees. Understanding how the impact of the pandemic varies across regions is critical to our understanding of the state's labor market and provides insights to identify priority areas of investment.

Impact on Jobs and Unemployment

The pandemic had widespread impact on employment across regions, with average employment levels still below pre-pandemic levels in most regions through 2022. Initial

pandemic-related job impacts across these regions ranged from a 5.4% reduction in jobs in the Boston WDA to an 11.1% decrease in the Cape & Islands WDA. By 2022, only three WDAs—Boston, Central, and Metro North—had recovered the jobs lost during the pandemic (Table 1).

Table 1

Change in Total Non-Farm Employment by WDA

Area	Change in Employment (2019 - 2020)	Percent Change in Employment (2019-2020)	Change in Employment (2019 - 2022) *	Percent Change in Employment (2019-2022) *
Berkshire WDA	-6,094	-10.5%	-3,188	-5.5%
Boston WDA	-37,018	-5.4%	2,891	0.4%
Bristol County WDA	-10,243	-7.0%	-879	-0.6%
Brockton WDA	-7,767	-7.9%	-2,358	-2.4%
Cape & Islands WDA	-12,100	-11.1%	-3,322	-3.0%
Central MA WDA	-15,931	-5.9%	219	0.1%
Franklin/Hampshire WDA	-7,673	-8.0%	-1,238	-1.3%
Greater Lowell WDA	-8,739	-6.7%	-4,636	-3.6%
Greater New Bedford WDA	-6,639	-7.5%	-1,326	-1.5%
Hampden County WDA	-17,048	-8.0%	-8,737	-4.1%
Lower Merrimack Valley WDA	-8,911	-5.9%	-365	-0.2%
Metro North WDA	-27,010	-5.8%	150	0.0%
Metro South/West WDA	-44,732	-7.4%	-14,747	-2.5%
North Central WDA	-6,538	-7.7%	-1,725	-2.0%
North Shore WDA	-15,970	-8.9%	-5,204	-2.9%
South Shore WDA	-19,152	-8.3%	-5,290	-2.3%
Statewide	-251,565	-7.0%	-49,755	-1.4%
Source: Quarterly Workforce Indicators. *2022 data is from the Q1 to Q3.				

The Boston WDA's unique industrial composition has played an important role in the recovery of total jobs lost during the pandemic. By the end of 2022, the top four sectors in the region—including health care and social assistance, professional, scientific, and technical services, finance and insurance, and education services—had fully recovered jobs lost during the pandemic. Data from the Quarterly Workforce Indicators (QWI) show that these four sectors accounted for approximately 54% of pre-pandemic total employment in the Boston WDA, compared to about 38% outside of the Boston WDA.

In the health care and social assistance sector, one factor contributing to the sector recovery was the rebound of employment in the hospital industry, one of the four industry subsectors within the health care and social assistance sector. The hospital industry accounts for about 65% of employment in the health care and social assistance sector in the Boston WDA (QWI). This is uniquely high compared to other regions where the hospital industry accounts for employment in the range of 13% in Metro South/West WDA to 31% in Metro North WDA (QWI). Boston WDA boasts of some of the largest hospitals in Massachusetts, and as reported by the [Boston Planning & Development Authority](https://bostonplans.org/getattachment/33993523-dce0-4cfd-903c-5eb8744733e8), (bostonplans.org/getattachment/33993523-dce0-4cfd-903c-5eb8744733e8) four out of the

ten largest employers in Boston are hospitals, and they include Massachusetts General Hospital, Brigham and Women’s Hospital, Boston Children’s Hospital, and Beth Israel Deaconess Medical Center.

The Boston WDA is also differentiated from other regions in the state by its substantial share of employment in the professional, scientific, and technical services sector. Specifically, this sector is the second largest source of employment in the area representing about 14% of total employment in the Boston WDA in 2022 (QWI). When compared to other regions, employment in this sector is relatively high in Boston WDA, except for Metro North WDA which has an employment share of about 20%. The sector’s employment rates in other regions vary, ranging from about 3% in Brockton WDA to about 13% in the Metro South/West WDA. As was noted previously, this sector has seen the largest employment gains in the state compared to pre-pandemic levels, supported by growth in life sciences research, the technology sector, and remote work.

In contrast, the Berkshire WDA has been grappling with a considerable share of unrecovered job losses, which stood at 5.5% by the end of 2022 (QWI). A key contributing factor is the sluggish rebound in the accommodation and food services sector, which is the area’s second-largest employer, accounting for about 12% of total employment in 2022. When compared to other regions, the employment share in the accommodation and food services sector is relatively high in Berkshire WDA, except for Cape & Islands WDA which has an employment share in this sector of about 16%. In the other areas, the employment share in this sector varies, from approximately 6% in Metro South/West WDA to about 10% in South Shore WDA.

This sector was severely impacted by the shutdowns and social distancing measures implemented during the COVID-19 pandemic. This caused a steep drop in both leisure and business travel, which heavily impacted the sector due to its reliance on tourism and corporate travel. The drop in tourism and business travel resulted in reduced demand for various services in the sector, resulting in significant job losses.

The unemployment rates across all 16 WDAs have fallen below pre-pandemic levels by April 2023 (*Table 2*). However, according to the Local Area Unemployment Statistics (LAUS), the rate across the regions varies, ranging from 1.9% in Metro North WDA to 3.5% in the Cape & Islands WDA.

Table 2

Unemployment Rate by WDA

Area	2019 Unemployment Rate	2023* Unemployment Rate
Berkshire WDA	3.7%	2.8%
Boston WDA	2.7%	2.2%
Bristol County WDA	3.7%	3.0%
Brockton WDA	3.3%	3.0%
Cape & Islands WDA	4.1%	3.5%
Central MA WDA	3.2%	2.5%

Franklin/Hampshire WDA	2.9%	2.0%
Greater Lowell WDA	3.0%	2.4%
Greater New Bedford WDA	4.2%	3.2%
Hampden County WDA	4.3%	3.0%
Lower Merrimack Valley WDA	3.4%	2.8%
Metro North WDA	2.3%	1.9%
Metro South/West WDA	2.4%	2.0%
North Central WDA	3.3%	2.6%
North Shore WDA	2.9%	2.4%
South Shore WDA	2.9%	2.3%
Source: BLS – Local Area Unemployment Statistics. *The 2023 data is from January to April (Q1).		

In Metro North WDA, the unemployment rate declined from 2.3% in 2019 to 1.9% in the first quarter of 2023 (BLS). This rate is the lowest compared to other regions where it ranges from 2.0% in Franklin/Hampshire and Metro South/West WDAs respectively to 3.5% in Cape & Islands WDA in the first quarter of 2023.

A significant factor that has contributed to the decline in the region's unemployment rate is the full rebound of employment in the professional, scientific, and technical sector. As the largest employer in the Metro North WDA, accounting for about 20% of the region's total employment, the full recovery of this sector has a large effect on the area's unemployment dynamics (QWI). Additionally, the advantageous location of the region, being near Boston WDA, could be contributing to the decline in the unemployment rate. The proximity to Boston WDA provides the benefits of industry interconnectivity and the ability of the region's unemployed population to find jobs in Boston WDA.

Similarly, the unemployment rate in the Cape & Islands WDA declined from 4.1% in 2019 to 3.5% in the first quarter of 2023 (BLS). However, when compared to other regions, this rate remains relatively high. One contributory factor to this trend is the sluggish recovery of the accommodation and food services sector, the region's leading employment sector, which accounts for about 16% of jobs in 2022. As of 2022, employment in the accommodation and food services was down by 8%. Another factor that has influenced the region's unemployment landscape is the slow rebound in the retail trade sector, which is the area's third-largest employer, comprising approximately 14% of the region's total employment in 2022. Pandemic-related shutdown and restrictions resulted in job losses as many businesses had to temporarily close due to reduced customer traffic.

Labor Market Conditions

The labor force and the employed population in the 16 WDAs remain below the pre-pandemic level (*Table 3*). According to [Bureau of Labor Statistics, bls.gov/cps/definitions.htm#laborforce](https://bls.gov/cps/definitions.htm#laborforce) the labor force encompasses individuals who are 16 years of age or older and classified as either employed or unemployed. The employed population consists of individuals who are deemed employed if during the survey's reference week, they either worked for a minimum of one hour for pay, engaged in at least

one hour of work in a self-owned business or contributed unpaid labor for at least 15 hours in a family-owned business or farm.

Table 3

Changes in Total Labor Force and Employed Population by WDA

Area	Change in Labor Force (2019-2023) *	Change in Employed Population (2019-2023) *
Berkshire WDA	-6.7%	-7.4%
Boston WDA	-2.0%	-2.4%
Bristol County WDA	-2.4%	-3.4%
Brockton WDA	-2.0%	-2.9%
Cape & Islands WDA	-7.2%	-9.4%
Central MA WDA	-2.0%	-2.5%
Franklin/Hampshire WDA	-3.1%	-3.5%
Greater Lowell WDA	-3.0%	-3.5%
Greater New Bedford WDA	-3.8%	-4.7%
Hampden County WDA	-3.5%	-3.8%
Lower Merrimack Valley WDA	-2.5%	-3.2%
Metro North WDA	-1.8%	-2.2%
Metro South/West WDA	-2.4%	-2.9%
North Central WDA	-2.8%	-3.5%
North Shore WDA	-2.4%	-3.1%
South Shore WDA	-1.4%	-2.0%
Statewide	-2.6%	-3.2%
Source: Local Area Unemployment Statistics. *2023 Data is from January to April (Q1).		

Regional disparities exist in the decline of the labor force, ranging from 1.4% in the South Shore WDA to 7.2% in the Cape & Island WDA. At the same period, the decrease in the employed population fluctuates between 2.0% in the South Shore WDA and 9.4% in Cape & Island WDA.

The Berkshire and Cape & Islands labor force have been the most sluggish in the recovery of the labor force, with 6.7% and 7.2% of the workforce yet to rejoin the labor market. At the same period, the employed population is lagging by 7.4% and 9.4% respectively. This is especially notable in the Cape & Islands WDA which experienced one of the most severe shocks during the pandemic period.

In both the Cape & Islands and Berkshire Workforce Development Areas (WDAs), demographic shifts towards an aging population could be posing challenges for labor force recovery. According to the [Cape & Island Regional Workforce Blueprint](https://capeandislandswb.com/wp-content/uploads/CIWDB-Regional-Planning-Blueprint-Narrative-5.24.pdf), [masshire-capeandislandswb.com/wp-content/uploads/CIWDB-Regional-Planning-Blueprint-Narrative-5.24.pdf](https://capeandislandswb.com/wp-content/uploads/CIWDB-Regional-Planning-Blueprint-Narrative-5.24.pdf) the region is experiencing a decline in its core labor force age group (30-54), while seeing an increase in the 55-69 age bracket. This suggests a portion of the workforce is nearing retirement, which could hinder the area's ability to recover its labor force.

Similarly, the Berkshire WDA faces its own challenges, as outlined in the [Berkshire Workforce – Local WIOA Plan](https://www.mass.gov/doc/berkshire-wioa-local-plan-package-fy22-fy25/workforce-local-wioa-plan). [mass.gov/doc/berkshire-wioa-local-plan-package-fy22-fy25/](https://www.mass.gov/doc/berkshire-wioa-local-plan-package-fy22-fy25/workforce-local-wioa-plan) The region has seen a 3.1% population decline since 2012 and is projected to lose an additional 2.2% over the next five years. Also, the 20-24 age group is expected to see a sharp decline of approximately 2,000 individuals, or 22%. This loss of younger workers is a concern as it exacerbates the challenges faced by employers in terms of workforce supply.

Moreover, the Berkshire WDA has more than 28,100 individuals aged 65 and older, significantly above the national average in proportion to its total population. This also points to the challenges related to retirement and labor supply.

Understanding Regional Differences

When delving into regional differences, an important inquiry revolves around whether changes in the economy can be attributed to differences in industrial compositions across regions or differences in local regional characteristics. To delve into these dynamics, *Table 4* breaks down the change in employment in each WDA between 2019 and 2022 based on three components:

- **Industrial mix effect:** This effect describes how employment in the region would have been expected to change if employment within each region grew at the national rate for that particular industry. This measure helps to highlight how differences in industrial composition across regions impacts growth.
- **The national growth effect:** This effect describes how employment in the region would be expected to change given overall growth in the national economy. Given that all regions experience the same national effect, the value is constant across regions.
- **The local effect:** This component measures the part of the change in regional employment attributed to local conditions. These local conditions could include differences in policies, the competitiveness of business, or labor force characteristics that are specific to each region.

The industry mix effect varies across different WDAs. This suggests that the specific mix of industries present in each area contributes differently to their economic changes over this period. For instance, the Boston WDA and Metro North WDA show a positive industry mix effect of 1.4% and 1.2% respectively. These regions have a high concentration of employment in the professional, scientific, and technical services sector. Conversely, the Berkshire WDA and Cape & Islands WDA are examples of regions that had slight negative industry mix effects of -0.5% and -0.8% respectively. Both regions have large tourism industries that were impacted by the pandemic.

The data suggests that most of the differences across WDAs can be attributed to local effects, with this measuring ranging from -.6% to -5.4%. The largest local effects were in the Berkshire WDA, where this component accounted for a -5.4% drop in employment.

Table 4

Total Net Effect of Percent Change in Employment by WDA

Area	Industry Mix Effect	National Growth Effect	Local Effect	Total Net Effect
Berkshire WDA	-0.5%	0.4%	-5.4%	-5.5%
Boston WDA	1.4%	0.4%	-1.4%	0.4%
Bristol County WDA	-0.2%	0.4%	-0.8%	-0.6%
Brockton WDA	0.1%	0.4%	-2.9%	-2.4%
Cape & Islands WDA	-0.8%	0.4%	-2.6%	-3.0%
Central MA WDA	0.3%	0.4%	-0.6%	0.1%
Franklin/Hampshire WDA	-0.3%	0.4%	-1.4%	-1.3%
Greater Lowell WDA	0.8%	0.4%	-4.8%	-3.6%
Greater New Bedford WDA	0.0%	0.4%	-1.9%	-1.5%
Hampden County WDA	-0.1%	0.4%	-4.4%	-4.1%
Lower Merrimack Valley WDA	0.0%	0.4%	-0.6%	-0.2%
Metro North WDA	1.2%	0.4%	-1.6%	0.0%
Metro South/West WDA	0.9%	0.4%	-3.8%	-2.5%
North Central WDA	-0.4%	0.4%	-2.0%	-2.0%
North Shore WDA	-0.5%	0.4%	-2.8%	-2.9%
South Shore WDA	0.0%	0.4%	-2.7%	-2.3%

Source: Quarterly Workforce Indicators

One factor that has likely contributed to a slow recovery across regions is the health care and social assistance sector, which is the largest employment sector across 10 WDAs. While employment in the health care and social assistance sector had recovered to pre-pandemic levels nationally in 2022, employment lagged pre-pandemic levels in all regions except for Boston.

The extent of decline in this sector varies across these WDAs, ranging from 1.4% in the Metro South/West WDA to 12.2% in the Greater New Bedford WDA (Table 5). Expanding on this observation, the health care and social assistance sector contribution to job losses in the 15 WDAs varies, and it ranges from 4.5% in Metro South/West WDA to 61.9% in Greater New Bedford WDA. Within the Greater New Bedford WDA and Central WDA, the health care and social assistance employment remains more than 10% below pre-pandemic levels in 2022. However, this sector accounts for more than 60% of the remaining post-pandemic job losses in both regions.

The lagging recovery of the health care and social assistance sector outside Boston through 2022 can largely be attributed to differences in the composition of the sector across regions. We noted previously, the Boston WDA is distinguished by the high level of employment in the hospital sector, which statewide had nearly recovered to pre-pandemic levels in 2022. Outside of the Boston WDA, the health care sector is predominantly composed of ambulatory health care services like physicians and dentist offices, and nursing and residential care facilities.

Nursing and residential care facilities were hard hit during the pandemic and have been slow to recover. In 2022, employment in this sector was down more than 13,000 jobs statewide compared to pre-pandemic levels, a decline of 12% (Lightcast). The Cape & Islands WDA, the New Bedford WDA, and the North Shore WDA were among the areas hardest hit by the fall in nursing and residential care facility employment. These declines are consistent with a decline in occupancy among skilled nursing facilities in Massachusetts, which fell from 85% in 2019 to 75% in 2022 (Kaiser Family Foundation).

In terms of earnings, the average monthly earnings in the health care and social sector increased across all 16 WDAs (see *Table 23*). The fact that some of the highest increases in earnings have occurred in WDAs with the largest jobs losses—including Greater New Bedford, Berkshire, Cape & Islands, and Central—suggest that worker shortages are a key contributor to the delayed recovery of this sector.

Table 5

Health care Employment and Earning Changes by WDA

Area	Percent Change in Employment (2019-2022)*	Percent Share of Employment Losses (2019-2022)*	Percent Change in Average Monthly Earning (2019-2022)*
Berkshire WDA	-5.9%	-17.7%	15.0%
Boston WDA	2.0%	2.0%	9.0%
Bristol County WDA	-3.8%	-25.0%	17.0%
Brockton WDA	-3.4%	-24.9%	15.9%
Cape & Islands WDA	-10.3%	-38.0%	14.6%
Central MA WDA	-9.9%	-60.6%	18.6%
Franklin/Hampshire WDA	-5.0%	-30.6%	14.9%
Greater Lowell WDA	-10.0%	-36.5%	13.3%
Greater New Bedford WDA	-12.2%	-61.9%	20.4%
Hampden County WDA	-3.4%	-18.5%	11.2%
Lower Merrimack Valley WDA	-5.1%	-37.9%	12.9%
Metro North WDA	-5.8%	-16.1%	16.9%
Metro South/West WDA	-1.4%	-4.5%	15.7%
North Central WDA	-4.8%	-24.2%	22.3%
North Shore WDA	-9.4%	-39.1%	18.7%
South Shore WDA	-1.8%	-8.2%	21.1%
Source: DER calculations using the Quarterly Workforce Indicators.			
*2022 data is from the Q1 to Q3.			

Overall, the pandemic had a significant impact on the labor markets of Massachusetts' 16 Workforce Development Areas (WDAs). While most regions have made progress in their recovery, there are still notable differences in the pace of recovery across regions. While regions like Boston and Metro North benefited from an advantageous industrial composition, much of the variation across regions is attributed to local dynamics,

particularly the slow recovery of health care and social assistance sectors in regions outside of Boston. In many cases, the local factors related to demographics and an aging workforce, which has been growing pressure on local labor markets and slowed the recovery to full employment.

Understanding the dynamics of the labor force is crucial for the development of effective workforce investment strategies. The labor market is not a monolithic entity; rather, it is composed of diverse groups, each with unique characteristics, experiences, and challenges. Changes in employment and labor force composition by age, race and ethnicity, disability status, nativity, and educational attainment can reveal important trends and disparities. These insights can guide policy interventions, helping to ensure that workforce development efforts are inclusive, equitable, and responsive to the needs of all workers.

Age Group Analysis

Table 6

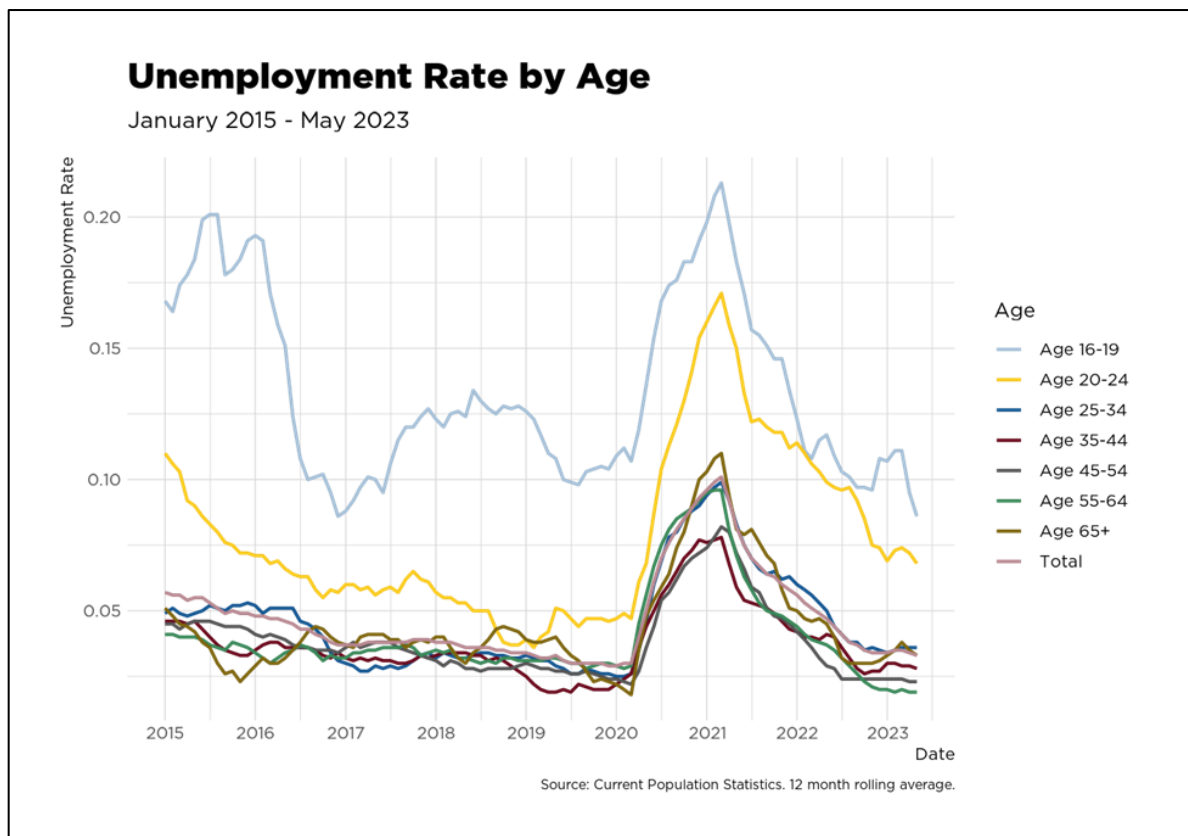
Change in Employment by Age Group – December 2019–May 2023

Age	Employment - Dec 19	Employment - May 23	Change	% Change
Age 16-19	110,164	122,981	12,817	11.6%
Age 20-24	334,143	296,211	-37,932	-11.4%
Age 25-34	865,808	803,626	-62,182	-7.2%
Age 35-44	711,870	733,698	21,828	3.1%
Age 45-54	766,121	710,557	-55,564	-7.3%
Age 55-64	665,777	663,632	-2,145	-0.3%
Age 65+	274,329	272,684	-1,645	-0.6%
Source: Current Population Statistics. 12-month rolling averages.				

The economic consequences of the pandemic have affected various age groups differently. Demographic changes have also played a role in reshaping the labor force's age distribution. As of May 2023, employment levels have improved for two specific age groups: 16-19 and 35-44 years old, compared to pre-pandemic figures. Conversely, employment has declined for other age groups (*Table 6*).

During the worst phase of the pandemic, young workers, especially those between 16-19 and 20-24 years old, suffered the most. Their unemployment rates skyrocketed to over 20% and 15%, respectively. While most age groups have since recovered, with unemployment rates falling back to pre-pandemic levels between 2% and 3.5%, the 20-24 age group continues to face challenges. As of May 2023, the 12-month average unemployment rate for this group was 6.2%, a significant increase from its 2019 average of 4.6%. Furthermore, nearly 40,000 fewer workers are employed in this age group compared to before the pandemic (*Figure 8*).

Figure 8



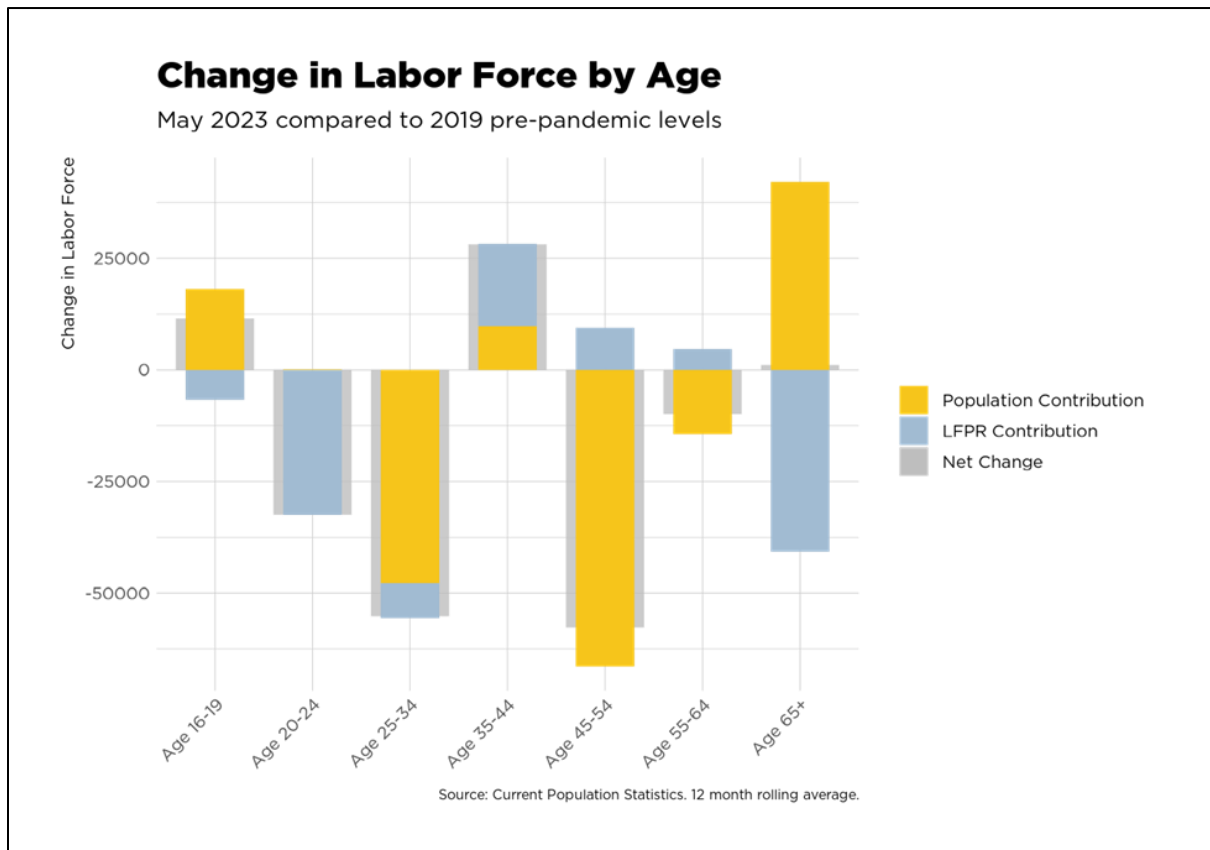
Examining the changes in labor force participation during the pandemic reveals a significant decline among young workers aged 20-34 and those aged 45-54, corresponding to the large declines in employment among these groups. However, the driving forces behind these changes vary each between group.

To understand these changes, we can break down the change in the labor force within each age group into two components:

- The component representing the expected shift in the labor force given the change in the population size of the age group.

The component representing the shift in the labor force due to the change in the labor force participation rate with the age group

Figure 9



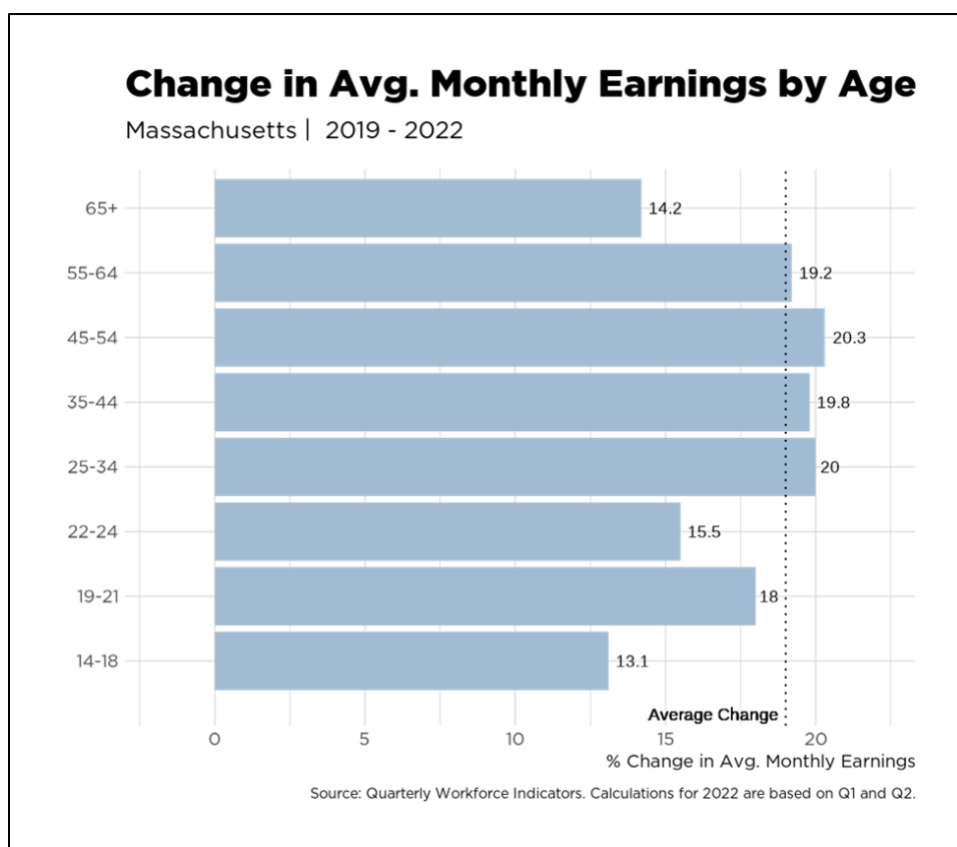
Using this approach reveals that for the 20-24 age group, the entire decline in the labor force, averaging 32,000 workers over 12 months as of May 2023 compared to the 2019 annual average, is due to decreased workforce participation (*Figure 9*).

In contrast, the decline of 57,000 workers in the 45-54 cohort is primarily due to a decrease in population within these age groups, despite an increase in workforce participation among the 45-54 age group compared to pre-pandemic levels.

While the labor force of workers and number of employed workers aged 16-19 has grown since the pandemic, this growth is due to population increase, as labor force participation rates among this group have fallen.

One potential explanation for this dynamic could be lagging wage growth among young workers. Wages have risen significantly since 2019, but wages for young workers have grown at a slower rate than average. Workers aged 14-18, 19-21, and 22-24 saw increases in average monthly earnings of 13.1%, 18%, and 15.5% respectively between 2019 and 2022, all lower than the 19% increase among all workers (*Figure 10*).

Figure 10



These trends reflect the fact that young workers, particularly those 16-24, are disproportionately employed in industries hardest hit by the pandemic. More than one-third of 16-24-year-olds were employed in accommodation and food services and retail trade in 2019. As previously described, these two industries have been among the slowest to recover from the pandemic, with employment levels in May 2023 that were more than 5% below pre-pandemic levels.

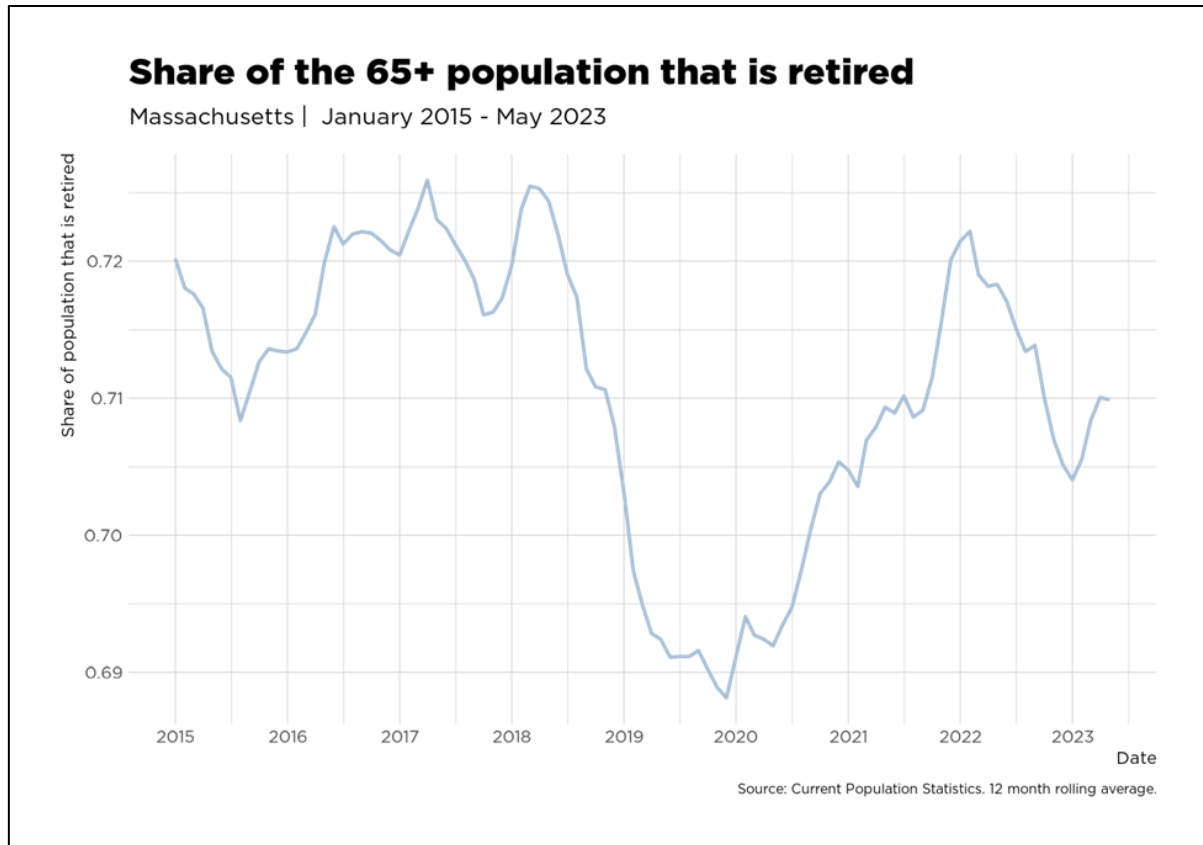
Additionally, as described in more detail later in the report, employment since the pandemic has grown among occupations that typically require a bachelor's degree but decreased among all other occupations. This could serve as a limiting factor for young workers who do not have a bachelor's degree.

The analysis also uncovers significant shifts within the 65 and older labor force, despite minimal net change in the overall group. Population growth in this cohort would have led to an increase of 42,000 workers if the group's labor force participation rate had remained at pre-pandemic levels. However, a decline in labor force participation has almost entirely offset the labor force gains due to population growth in this cohort (*Figure 11*).

This decline in labor force participation can partially be explained by increased retirement rates. Between December 2019 and May 2023, the 12-month-average share of the Massachusetts 65 and older population increased from 68.8% to 70.9%. While the retired rate is still moderate compared to historical levels, this shift from pre-pandemic levels

accounts for 2.1 percentage points of the 3.3 percentage point decline in labor force participation among older workers.

Figure 11



Race and Ethnicity

Data sources: The following analysis relies on several data sources to tell as complete a story as possible on how the pandemic has reshaped the economy for workers by race and ethnic groups. One of our primary sources is the *Current Population Survey*. Data from this monthly report provides the timeliest labor market data, yet, because of its small sample size in Massachusetts, it also limits our ability to disaggregate data by race and ethnicity. As a result, we are unable to distinguish people of different Hispanic origins, and we must aggregate data for Asian, Native American, and multi-racial people into an “All Other Groups” category. We recognize that doing so diminishes critical differences in experiences among workers across these groups. When possible, we aim to complement the Current Population Survey analysis use other data sources, such as QCEW, that allow for more detailed disaggregation by race and ethnicity, although usually at the expense of less timely data.

Defining race and ethnicity: Group data by race is presented for people who identify as a single race and non-Hispanic or Latino based on Census definitions. Hispanic or Latino data is presented for all people who identify as Hispanic or Latino, which can include any race. We acknowledge that the census imposes certain labels on individuals — which may not correspond to their self-perception, as only 50% of Americans believe the census represents their identity very well. Nevertheless, the census remains the most comprehensive and reliable source of demographic data that is available in the U.S., and it is essential to understand that the categories are constantly changing.

Table 7

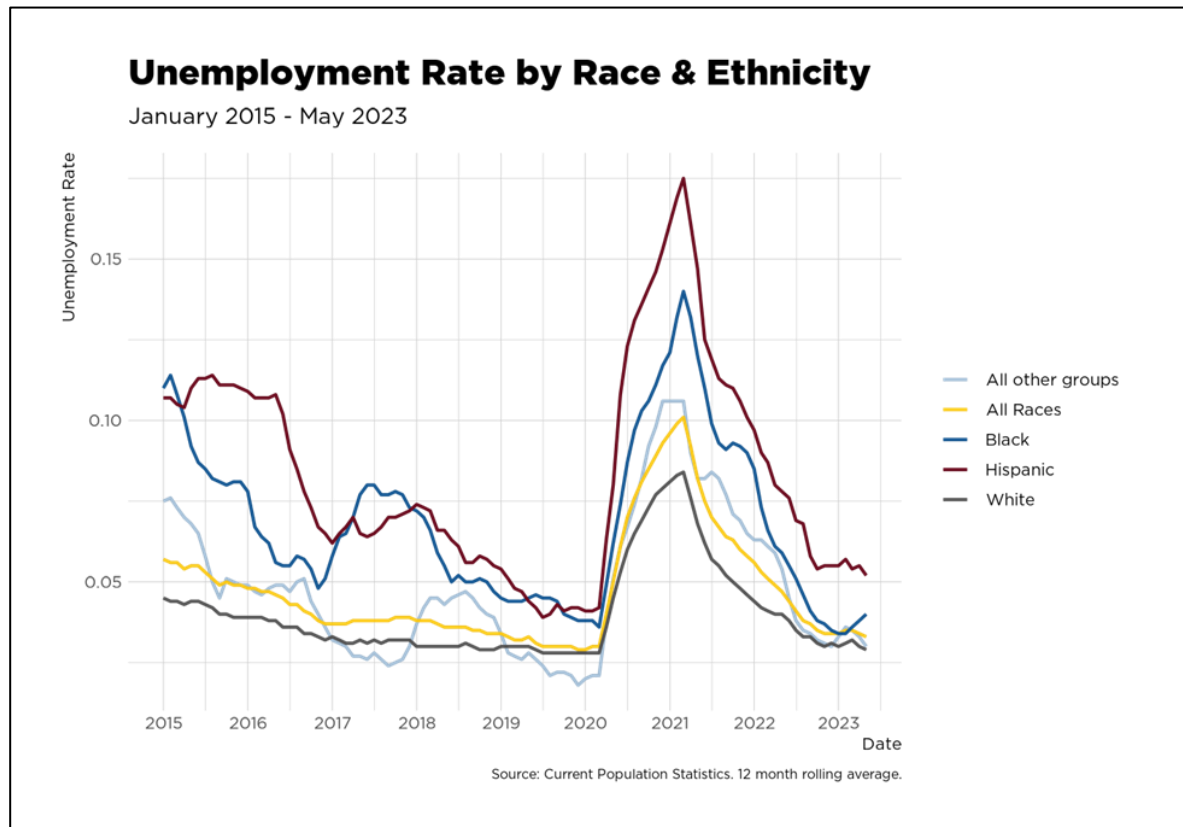
Change in Employment by Race – Q2 2019 to Q2 2022

Race/Ethnicity	Employment Q4 2019	Employment Q4 2022	Change in Employment	% Change in Employment
American Indian or Alaska Native	6,652	7,393	741	11.1%
Asian Alone	252,474	274,002	21,528	8.5%
Black	296,390	305,301	8,911	3.0%
Native Hawaiian or Other Pacific Islander	4,006	4,370	364	9.1%
Two or More Race Groups	46,910	51,865	4,955	10.6%
White	2,625,001	2,565,558	-59,443	-2.3%
Hispanic or Latino	396,654	421,309	24,655	6.2%
Source: Quarterly Workforce Indicators. Employment encompasses all workers who work in Massachusetts, including out of state workers.				

The economic shock caused by the pandemic was not felt uniformly across all racial and ethnic groups and has resulted in a more diverse workforce than before the pandemic. By 2022, all employment across all worker groups except the white group had returned to pre-pandemic levels, suggesting that the significant decline in the white labor force due primarily to an aging population has created new employment opportunities for workers of color (*Table 7*).

On average, Hispanic or Latino and Black workers experienced the most significant increases in unemployment, with 12-month-average unemployment rates reaching 14% and 17.5% respectively, compared to 10.1% for the full population (*Figure 12*).

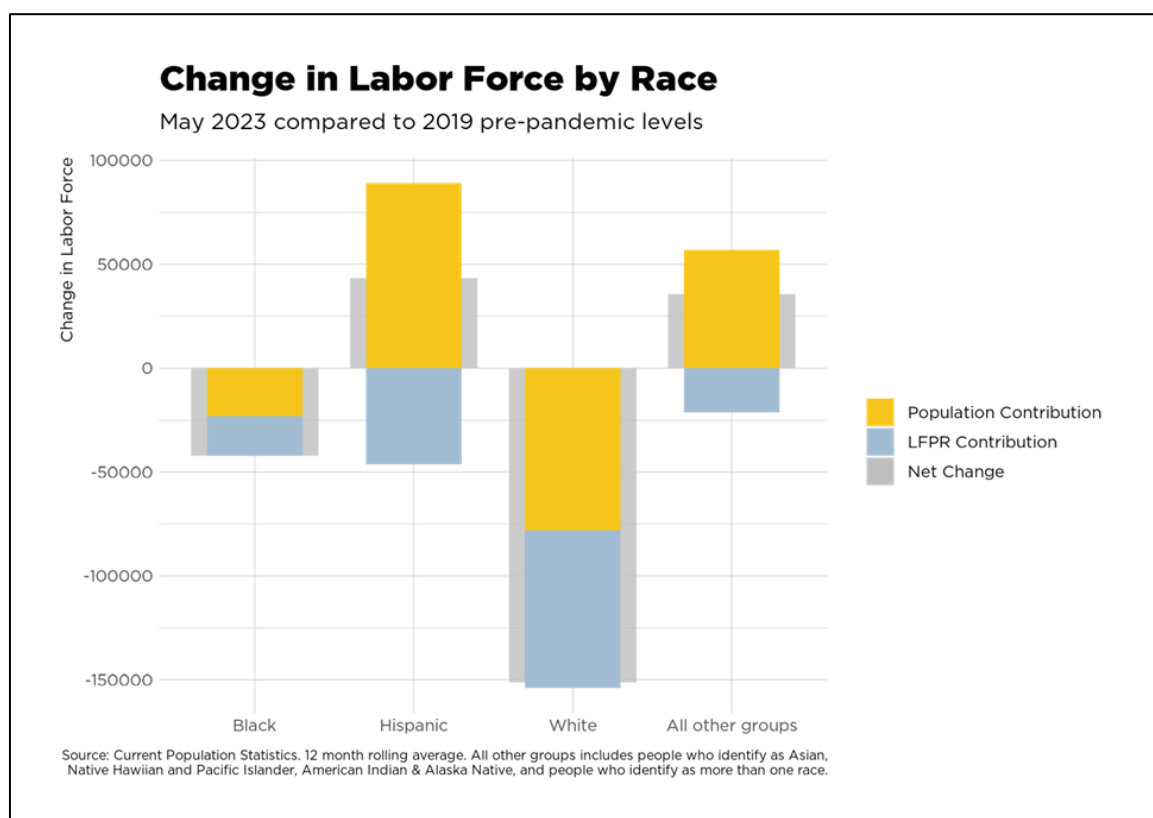
Figure 12



By May 2023, all these groups, except for Hispanic workers, had seen their unemployment rates return to pre-pandemic lows. However, Hispanic workers continued to face higher unemployment rates compared to the rest of the population.

A detailed breakdown of the changes in the labor force by race and ethnicity reveals an interesting trend: our labor force has become more diverse than it was before the pandemic. Despite declines in labor force participation, the Hispanic and All Other Groups labor forces have grown by 43,000 and 36,000 respectively, driven by growing populations.

Figure 13



In contrast, the Black and White labor forces have seen declines of 42,000 and 151,000 respectively. These declines are due to a combination of shrinking populations and falling labor force participation rates (*Figure 13*).

These trends reflect longer terms shift in the demographics of the Massachusetts labor force. Over the past five years, the share of employment among workers who identify as white alone and non-Hispanic has declined from 73.8% in Q4 of 2017 to 70.7% in Q4 of 2022 (*Table 8*).

Table 8

Share of employment by Race and Ethnicity

Race/Ethnicity	Share of Total Employment Q4 2017	Share of Total Employment Q4 2022	Percentage Point Change
American Indian or Alaska Native	0.2%	0.2%	0.0%
Asian Alone	6.5%	7.5%	1.0%
Black	7.9%	8.4%	0.5%
Native Hawaiian or Other Pacific Islander	0.1%	0.1%	0.0%
Two or More Race Groups	1.2%	1.4%	0.2%
White	73.8%	70.7%	-3.1%
Hispanic or Latino	10.3%	11.6%	1.3%

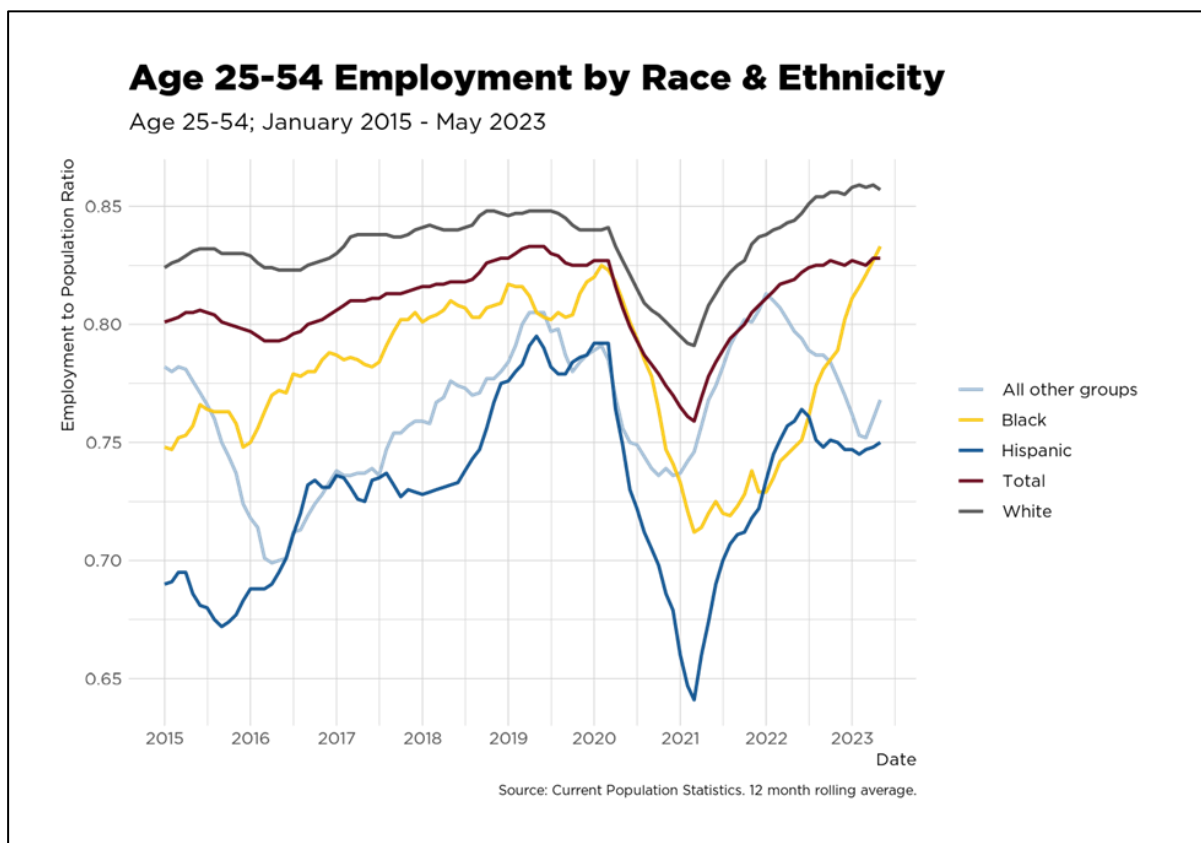
Source: Quarterly Workforce Indicators. Employment encompasses all workers who work in Massachusetts, including out of state workers.

The evolution of the economy during and after the pandemic has resulted in a particularly robust labor market for Black workers. As of May 2023, the 12-month-average share of the

25-54-year-old Black population that was employed stood at 83.3%. This exceeds both the pre-pandemic high of 81.8% and the rate for the overall population of 82.5%. This demographic is particularly critical to the economy as it represents the core of the labor market who are typically experiencing their most productive years of employment. This increase in the share of the employed population underscores that the decline in labor force participation among Black workers was driven entirely by changes in participation among the Black 16-24 and 55 and older populations (Figure 17).

Additionally, Massachusetts had the smallest difference in Black and White unemployment rates of any state in the U.S. in the first quarter of 2023 ([Economic Policy Institute \(epi.org/indicators/state-unemployment-race-ethnicity/\)](https://epi.org/indicators/state-unemployment-race-ethnicity/)), with average monthly earnings for Black workers increasing by 22.3% from 2019 to 2022 (Figure 14). While pre-pandemic gaps in employment, wages, and wealth between White and Black workers persist, pandemic period shifts in the economy have expanded economic opportunities for Black workers in Massachusetts.

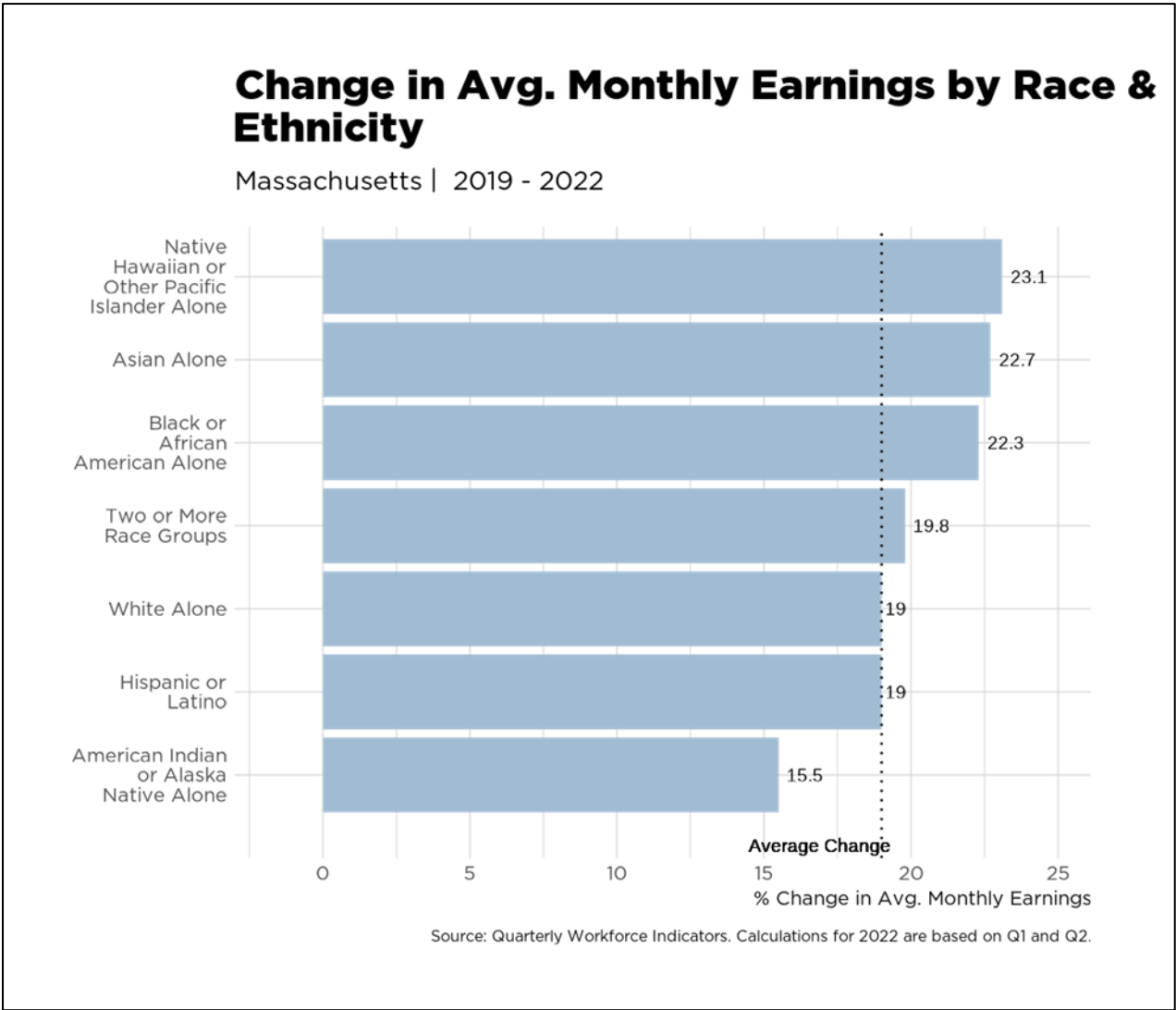
Figure 14



However, the strong labor market for Black workers contrasts sharply with the slower recovery of the Hispanic labor market. As of May 2023, the 12-month-average share of the 25-54 Hispanic population that was employed was 75%, compared to 78.7% pre-pandemic (Figure 14).

Between 2019 and 2022, average monthly earnings for Black workers rose by 22.3% (Figure 15). Over the same period, Hispanic or Latino workers in Massachusetts saw average monthly wages increase by 19.0%, equal to the average change across all workers.

Figure 15



While we do not yet have enough data to fully explain these different trajectories, there are a few possible explanations. First, it could relate to differences in employment by industry across the groups. Prior to the pandemic, Black workers were 50% more likely than Hispanic or Latino workers to be employed in the Health Care and Social Assistance sector, which has proven resilient to the pandemic shock (Table 9). In contrast, Hispanic and Latino workers—along with Native Americans and Pacific Islanders—were more concentrated in the Retail, Accommodation and Food Services, and Administrative and Support and Waste Management and Remediation Services sectors that were hit hard by the pandemic and have been slower to recover.

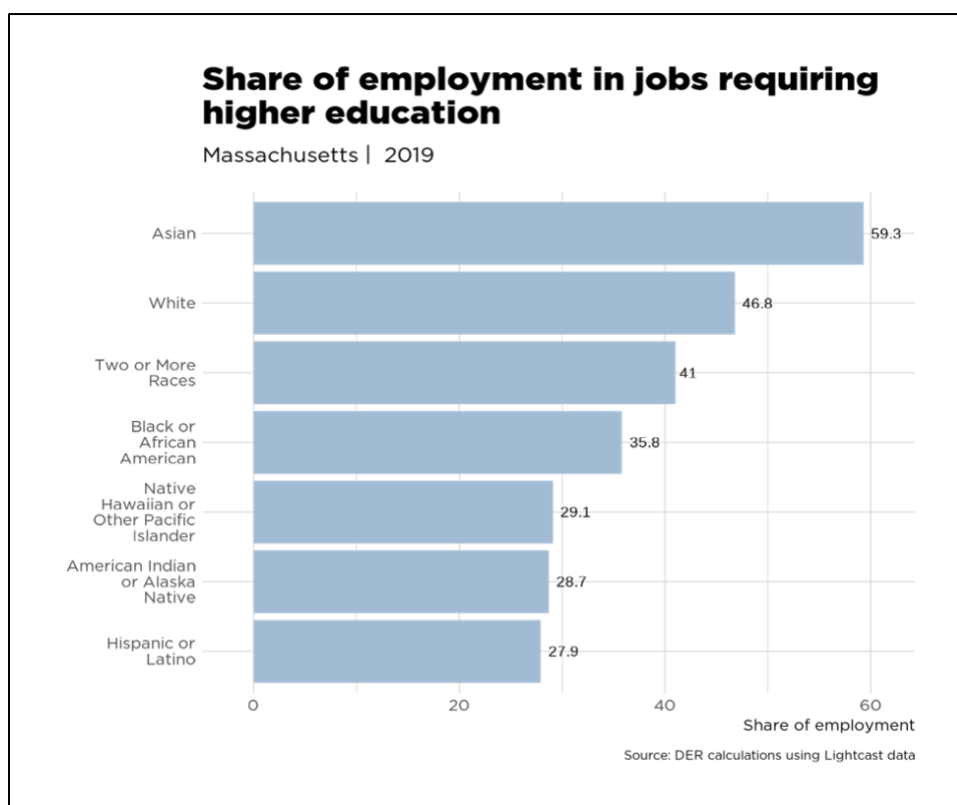
Table 9

Share of Employment in Top 5 Sectors by Race and Ethnicity – 2022

American Indian or Alaska Native	Asian
• Health Care and Social Assistance 17.2% • Accommodation and Food Services 13.3% • Retail Trade 12.3% • Educational Services 8.3% • Administrative & Support & Waste Management & Remediation Services 7.9%	• Professional, Scientific, and Technical Services 19.3% • Health Care and Social Assistance 15.0% • Accommodation and Food Services 10.0% • Manufacturing 9.7% • Educational Services 8.9%
Black or African American	Hispanic or Latino
• Health Care and Social Assistance 31.6% • Retail Trade 8.9% • Accommodation and Food Services 8.4% • Educational Services 8.2% • Administrative & Support & Waste Management & Remediation Services 8.2%	• Health Care and Social Assistance 21.2% • Accommodation and Food Services 11.6% • Retail Trade 10.9% • Administrative & Support & Waste Management & Remediation Services 10.1% • Manufacturing 8.3%
Native Hawaiian or Other Pacific Islander	Two or More Race Groups
• Health Care and Social Assistance 20.5% • Accommodation and Food Services 13.3% • Retail Trade 10.1% • Professional, Scientific, & Technical Services 8.7% • Administrative & Support & Waste Management & Remediation Services 8.5%	• Health Care and Social Assistance 17.5% • Retail Trade 11.6% • Educational Services 11.5% • Accommodation and Food Services 10.6% • Professional, Scientific, and Technical Services 10.0%
White	
• Health Care and Social Assistance 15.5% • Educational Services 11.5% • Professional, Scientific, and Technical Services 10.8% • Retail Trade 9.4% • Accommodation and Food Services 7.1%	
Source: Quarterly Workforce Indicators. Estimates based on average employment for Quarters 1-3 in 2022.	

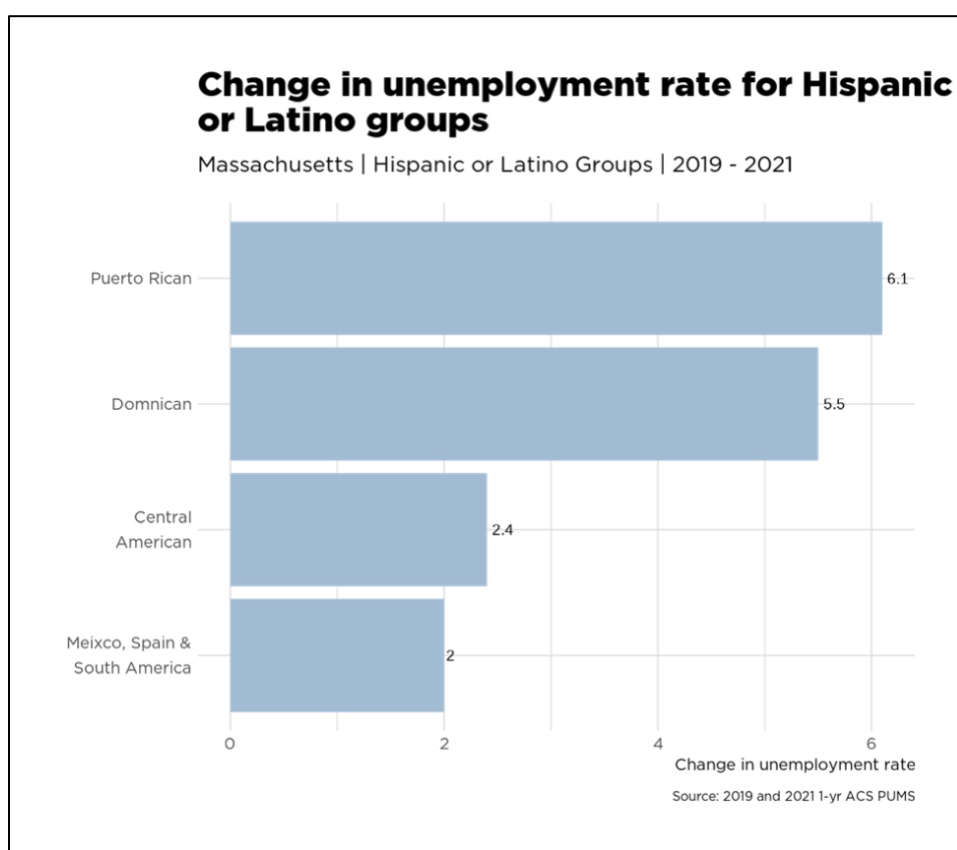
Additionally, Hispanic, or Latino workers—along with Native Americans and Pacific Islanders—were less likely to be employed in occupations requiring an associate or bachelor’s degree prior to the pandemic. In 2019, 27.9% of Hispanic or Latino worker were employed in occupations requiring higher education, compared to 35.8% of Black workers, and 46.8% of white workers (*Figure 16*). As we will discuss later, occupations that typically require a bachelor’s degree were most resilient during the pandemic and have seen an increase in employment through 2022. An additional factor that could contribute to these differences is geographic concentration of Hispanic or Latino populations in economic distressed Gateway Cities ([Boston Indictors, 2022](https://bostonindicators.org/-/media/indicators/boston-indicators-reports/report-files/avancemosya_final050222.pdf)) bostonindicators.org/-/media/indicators/boston-indicators-reports/report-files/avancemosya_final050222.pdf).

Figure 16



The pandemic had varying impacts on the diverse Hispanic or Latino labor force in Massachusetts. In 2021, 59% of the Hispanic or Latino labor force in Massachusetts was born outside of the United States (2021 1yr ACS). Prior to the pandemic, unemployment rates among Hispanic and Latino groups were similar, ranging from roughly 7% for those identifying as Puerto Rican or Dominican—which account for more than 50% of the Hispanic or Latino workforce in Massachusetts (including those born inside and outside of the U.S.)—to roughly 6% of workers with Central American roots and those with roots in Mexico, Spain, and South America (2019 ACS 1-yr PUMS). By 2021, unemployment rates had risen 6.1 percentage points to 13.2% among Puerto Rican workers, 5.5 percentage points to 12.2% among Dominican workers, 2.4 percentage points to 8.3% for Central American workers, and 2 percentage points to 7.6% for Mexican, Spanish, and South American workers (*Figure 17*).

Figure 17

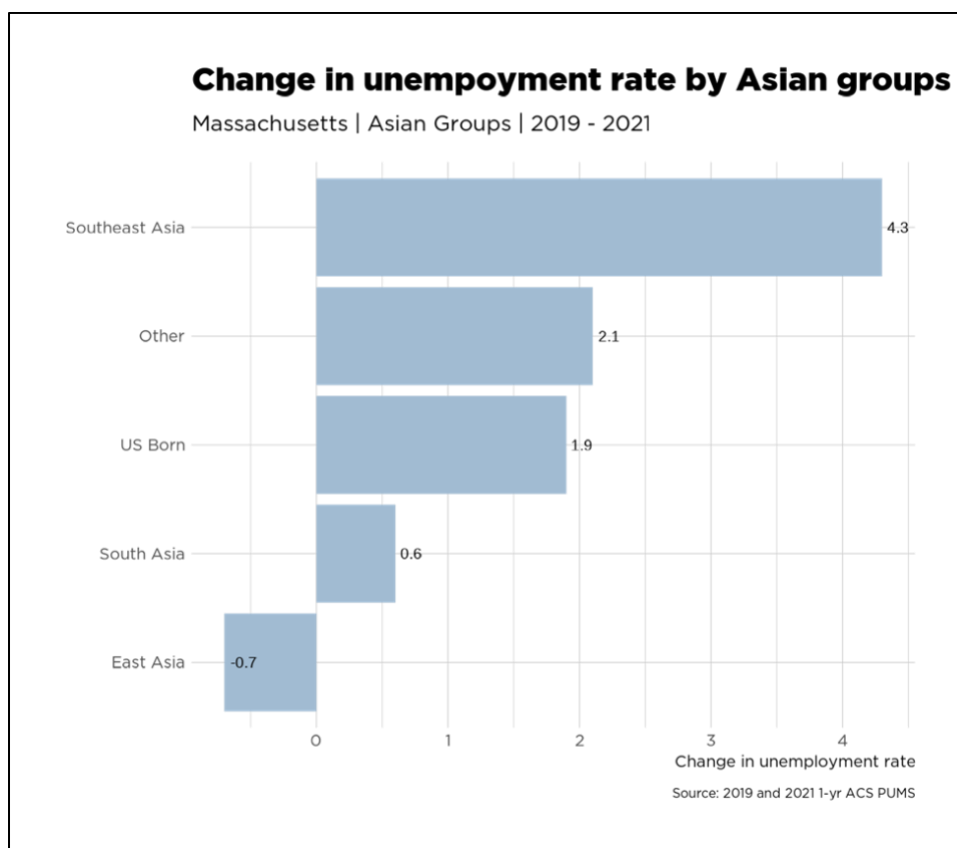


These negative employment effects were most severe among Hispanic and Latino workers who were born outside of the United States and who have lived in the United States for more than 5 years. Between 2019 and 2021, the unemployment rate for Hispanic and Latino workers who had lived in the United States for more than five years increased by 5.7 percentage points to 10.1%, compared to an increase of 3.1 percentage points among non-U.S. born Hispanic and Latino workers who had lived in the United States for less than five years, and an increase of 2.2 percentage points among Hispanic and Latino workers born in the United States (*2019 and 2021 1yr ACS PUMS*).

The Census Bureau's definition of the Asian population is also very diverse, representing people from countries ranging from China, India, Vietnam, and Syria. Like the Hispanic and Latino population, most Asian workers are foreign born, with US born workers making up less than one-third of the Asian workforce in Massachusetts (*2019 1yr ACS*). Prior to the pandemic, unemployment across Asian groups were similar, ranging from 3.2% among those from Southeast Asian—including China, Korea, Japan—to 4.2% for U.S.-born Asians. By 2021, the economic shock of the pandemic had varied impacts across groups of Asian workers. Unemployment increased most for immigrants from Southeast Asia—including people from Vietnam, the Philippines, and Cambodia—rising by 4.2 percentage points between 2019 and 2022. Unemployment rates for U.S. born Asians and those from the Middle East increased by 2 percentage points. Immigrants from South Asia—primarily from India—were less impacted, with unemployment rates increasing by just 0.6 percentage

points, while immigrants from East Asia—primarily from China—saw unemployment fall by 0.7 percentage points between 2019 and 2021 (*Figure 18*).

Figure 18



People with Disabilities

Table 10

Change in Employment in Massachusetts Among People with a Disability – 2019 to 2021

	Employed – 2019	Employed 2021	Percent Change in Employment
People with a Disability	191,358	197,918	3.4%
Total Population	3,701,708	3,604,195	-2.7%

Source: 2019 and 2021 1yr ACS PUMS

While overall employment experienced a decline between 2019 and 2021, employment among people with disabilities rose (*Table 10*). Despite lower levels of labor force participation, this group saw their employment expand during the pandemic, growing by 3.4% between 2019 and 2021. In contrast, overall employment among the total population fell by 2.7% over the same period (*2019 and 2021 1yr ACS PUMS*).

In 2019, the Massachusetts labor force included 212,000 people who identify as having a disability. This represented a labor force participation rate of 46% among the 16-64-year-old population, compared to 80% for the total population (2019 1yr ACS PUMS).

It's important to note that people who identify as having a disability are not a monolithic group. There is significant variation in experiences and engagement with the labor force across this population. In 2021, those who identified as having a hearing difficulty were most likely to engage in the labor force, with a labor force participation rate of 65% (Table 11). On the other hand, those reporting self-care difficulty were least likely to participate in the labor force, with a labor force participation rate of just 21%. Those reporting cognitive difficulty and physical difficulty represented the largest shares of workers with a disability at 39%, although just 44% of that population participated in the labor force.

Table 11

Labor Market Outcomes for Massachusetts 16 – 64-year-old People with a Disability – 2021

	Share of Workers with a Disability	Labor Force Participation Rate	Share of the Population with a Disability that is Employed
Physical Difficulty	25%	31%	25%
Vision Difficulty	18%	55%	50%
Hearing Difficulty	26%	65%	56%
Cognitive difficulty	39%	44%	35%
Independent living difficulty	20%	29%	22%
Self-care difficulty	7%	21%	15%
Any disability	100%	49%	41%
Source: 2021 1yr ACS PUMS. The 16-64-year-old population is used to account for the fact that the population with a disability is disproportionately in the 65 and older age range, which has a significantly lower labor force participation rate than the 16 to 64 population.			

A potential explanation for the observed increase in employment among individuals with disabilities could be that more people who were already employed began identifying as disabled during this period. This hypothesis is supported by the employment-to-population ratio, which remained steady at 40.9% in both 2019 and 2021 as employment increased.

Interestingly, despite the increase in employment during this period, the unemployment rate among people with a disability also rose from 9.8% to 15.3% between 2019 and 2021 (2019 and 2021 1yr ACS PUMS). This suggests that the labor force expanded, indicating an increase in the number of people identifying as having a disability and actively seeking employment.

People with disabilities can face a variety of barriers to employment, including physical accessibility of office workspaces, lack of transportation, and lack of flexibility in work schedules, among others. One trend that emerged during the pandemic that has the potential to address some of these barriers and expand employment opportunities for people with disabilities is the increase in remote work. In 2019, 6.5% of people with

disabilities worked from home, and by 2021 this figure had risen to 17.4%, representing a 176% increase (2019 and 2021 1yr ACS PUMS).

Despite these gains, people with disabilities were still less likely to work from home than the general population in 2021 (23.2%). This difference was not only driven by occupation mix among those with and without disabilities, as data suggests that within occupations, but people with disabilities were also less likely to work from home during the pandemic.

Table 12

Top 10 Occupations by Employment Among People with a Disability in Massachusetts – 2021

	Number of Employed People with a Disability	Share of Employed People with a Disability	Share of Employed People with a Disability Working from Home	Share of all Employed People Working from Home
Office and Admin Support Occupations	35,200	10.3%	10.5%	17.7%
Sales and Related Occupations	32,587	9.5%	7.0%	16.9%
Transportation and Material Moving Occupations	30,098	8.8%	2.7%	4.1%
Management Occupations	29,536	8.7%	15.4%	30.1%
Educational Instruction, and Library Occupations	22,492	6.6%	11.4%	15.1%
Food Preparation and Serving Related Occupations	22,363	6.6%	5.4%	3.6%
Production Occupations	19,698	5.8%	4.4%	5.8%
Health care Support Occupations	18,349	5.4%	5.1%	7.6%
Health care Practitioners and Technical Occupations	16,946	5.0%	12.1%	9.9%
Business and Financial Occupations	16,355	4.8%	25.5%	42.1%
Source: 2021 1yr ACS PUMS				

Considering the top 10 occupations employing people with disabilities in Massachusetts, the share of people with disabilities working from home in 2021 ranged from 25.5% in Business and Financial Occupations, to a low 2.7% in Transportation and Material Moving Occupations (*Table 12*). Yet, when considering occupations with higher shares of remote work, people with disabilities were less likely to work from home than the general population. For example, 10.5% of people with disabilities in Office and Admin Support Occupations worked from home in 2021, compared to 17.7% of the total population. Similarly, 15.4% of people with disabilities worked from home in Management Occupations compared to 30.1% in the general population, and 25.5% of people with disabilities work from home in Business and Financial Occupations, compared to 42.1% of the general population. Among the top 10 occupations, the only one in which people with disabilities were more likely to work from home than the general population was Health care Practitioners and Technical Occupations. This trend suggests there could be opportunities to expand work from home employment among people with disabilities.

The Foreign-Born Population

Table 13

Change in Employment and Labor Force for the Massachusetts Foreign Born Population – 2019 – 2021

	2019	2021	Change
Employed	804,743	802,019	-0.3%
Labor Force	834,281	859,117	3.0%

Foreign born people have been a growing part of the Massachusetts population and workforce over the past decade. In 2021, foreign-born workers represented 22% of the Massachusetts workforce (*2021 1yr ACS PUMS*). Despite increased restrictions on international travel and federal policies restricting immigration, the working age foreign-born population in Massachusetts grew by 3.2% from 2019 to 2021, a faster pace than the 1.6% growth rate between 2017 and 2019. Overall, employment among foreign born workers was remarkably resilient across the recession, falling by just 0.3% between 2019 and 2021, compared to a 2.7% decline among all workers (*Table 13*). Additionally, the foreign-born labor force increased by 3% over this period.

Foreign-born workers have immigrated to Massachusetts from diverse regions across the globe. In 2021, more than 75% of foreign-born workers were from Asia, Europe/Russia, Caribbean, and South America (*Table 14*).

Table 14

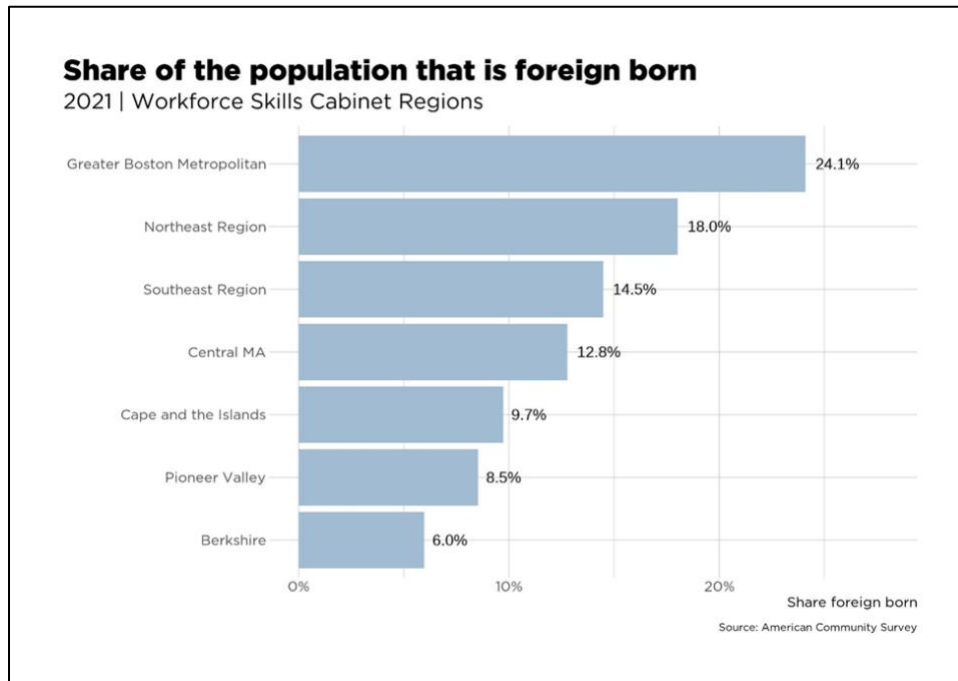
Share of Foreign-Born Workers in Massachusetts by Home Region

	Labor Force - 2021	Share of Labor Force - 2021	Change in Labor Force 2019 - 2021
Asia	235,876	27.5%	3.8%
Europe/Russia	152,226	17.7%	-0.2%
Caribbean	145,251	16.9%	6.5%
South America	116,572	13.6%	-0.4%
Central America	63,847	7.4%	-7.3%
Africa	58,527	6.8%	-8.7%
Other	33,389	3.9%	50.0%
Middle East/Asia Minor	21,781	2.5%	39.5%
Canada	17,342	2.0%	3.6%
Mexico	10,420	1.2%	-1.0%
Australia and New Zealand	3,886	0.5%	33.0%
Source: 2019 and 2021 1yr ACS PUMS			

The foreign-born population varies across regions in Massachusetts. In 2021, the of the population that is foreign-born ranged from 24% in the Greater Boston region, to 6% in the Berkshire region (*Figure 19*). Additionally, the geography of where different foreign-born residents of migrated varies, with many large immigrant communities outside of Boston. For

example, Framingham is a destination community for Brazilian immigrants, Quincy is a destination community for Chinese Immigrants, and Lawrence is a destination community for Dominican immigrants.

Figure 19



Foreign-born workers fill critical roles across a range of industries and occupations. In 2021, the occupations with the largest number of foreign-born workers ranged from software developers to cooks, to scientists, to construction workers. In many of these occupations, foreign-born workers make up a disproportionate share of the workforce. For example, foreign-born workers account for 22% of the total Massachusetts workforce, but account for 36.9% of software developers, 42.2% of cooks, and 73.5% of housekeeping cleaners (Table 15). In total, there are more than 170 occupations in which foreign-born workers are disproportionately employed.

Table 15

Top Occupations by Employment of Foreign-Born Workers in Massachusetts by 2021

	Foreign Born Workers	% Foreign Born Workers
Software Developers	28,164	36.9%
Janitors And Building Cleaners	24,275	41.9%
Other Managers	23,449	18.1%
Housekeeping Cleaners	22,410	73.5%
Nursing Assistants	19,508	44.6%
Postsecondary Teachers	18,713	32.1%
Cooks	18,146	42.2%
Physical Scientists, All Other	17,566	47.6%
Cashiers	14,916	22.2%
Construction Laborers	14,127	42.7%

While foreign-born workers play an increasingly important role in the Massachusetts workforce, they face unique barriers to employment. For some, English proficiency can be a barrier, which is essential for the ability of immigrants to obtain employment that fully uses their skills. In 2021, approximately 320,000 immigrant workers in Massachusetts (37%) reported having levels of English proficiency below the average English-only speaker (2021 1yr ACS PUMS).

For others, obtaining legal work status poses a barrier to full labor market participation. Using data from 2015 to 2019, it is estimated that there were 209,000 unauthorized immigrants in Massachusetts, excluding temporary residents like recent refugees or H-1B workers ([Migration Policy Institute](https://migrationpolicy.org/data/unauthorized-immigrant-population/state/MA#laborforce)) migrationpolicy.org/data/unauthorized-immigrant-population/state/MA#laborforce. While it is estimated that 73% in this population is engaged in the labor force, employment opportunities can be limited for workers without legal status, limiting their ability to fully use their skills and fill critical labor market gaps in Massachusetts. Additionally, immigrant workers face barriers to transferring credentials from their home country to the US, limiting their ability to utilize their skills in the labor force to the fullest extent.

Throughout 2023, a surge of migrants from Haiti and Latin America have arrived in the states, reaching an estimated 1,000 families per month by mid-2023. These migrant families have been relocated to shelters, hotels, and college dorms across 90 cities and towns in the Commonwealth, and programs have already been put in place to provide training and job search support. Yet, delays in obtaining work authorizations have prevented most of these new residents from working. As work authorization is obtained, there will be increased demand for the workforce system to aid these new residents in accessing the training and support they need to find employment in high-demand jobs.

Educational Attainment

Table 16

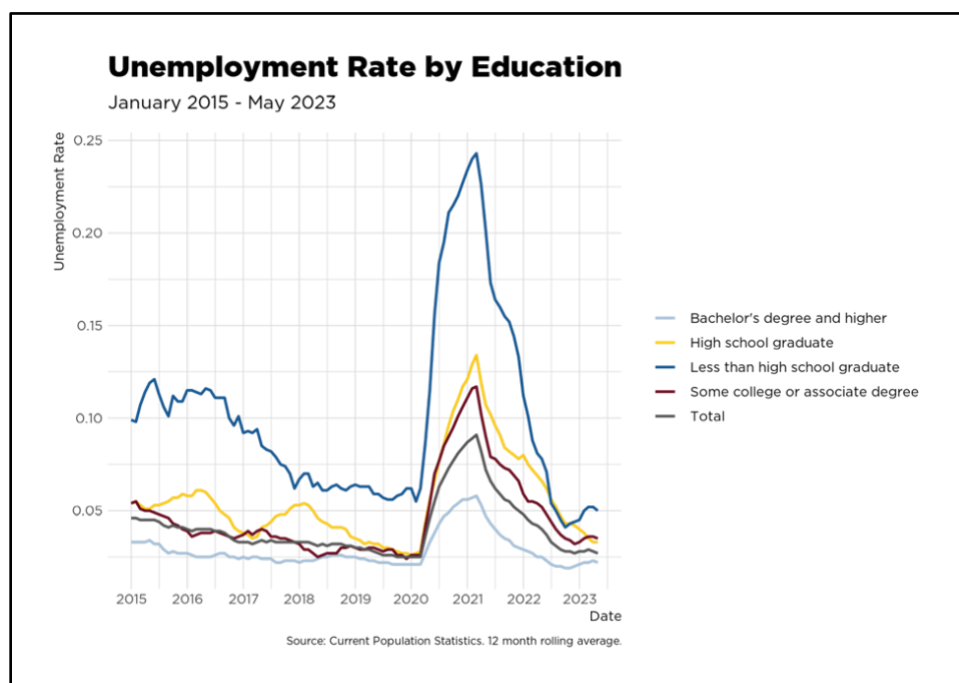
Change in Employment by Educational Attainment for the 25 and Older Population

Education	Employment - Dec 2019	Employment - May 2023	Change in Employment
Bachelor's degree and higher	1,752,085	1,895,541	8%
Some college, associate degree, or post-secondary certificate	639,194	517,450	-19%
High school graduate	759,249	638,168	-16%
Less than high school graduate	133,377	133,038	0%
Source: DER calculations using the Current Population Survey. 12-month rolling averages.			

Massachusetts has seen its economy shift towards favoring skilled workers with a bachelor's degree in the wake of the pandemic. From 2019 to May 2023, employment among degree

holders surged by 8%, while those with some college or associate degrees and those with just a high school diploma saw their employment shrink by 19% and 16% respectively (*Table 16*).

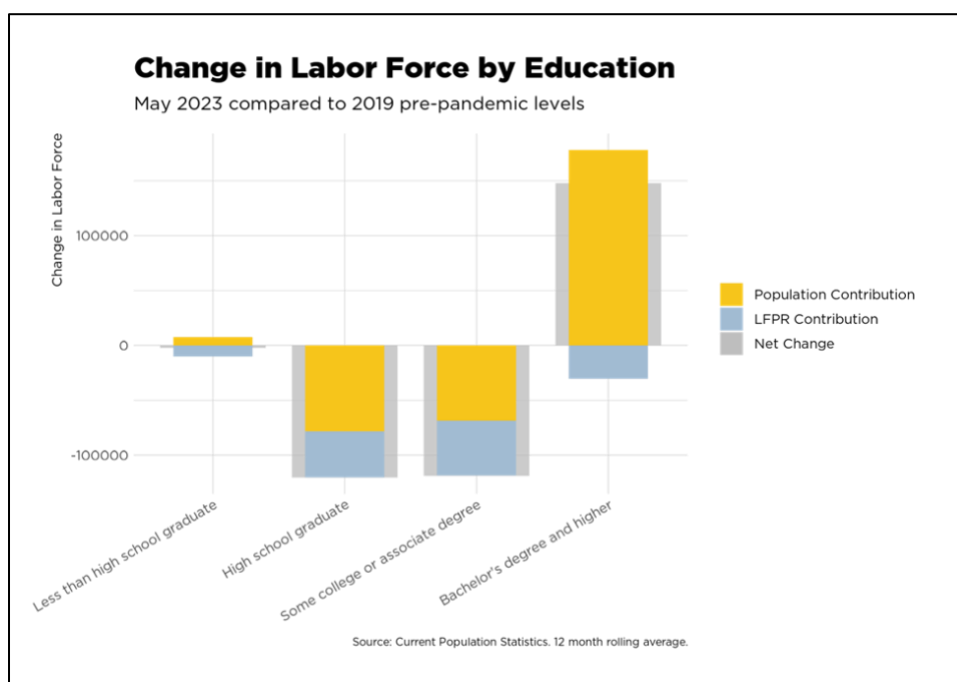
Figure 20



During the pandemic, the brunt of unemployment was borne by workers that have developed “skills through alternative routes” (STAR) such as community college, certificate programs, or on-the-job training and development, and do not have a bachelor’s degree. Those without a high school degree were hit hardest, with unemployment rates skyrocketing to nearly 25% (*Figure 20*). For those with a high school diploma or some college and associate degree, unemployment rates peaked over 10%. In stark contrast, those with a bachelor’s degree or higher saw their unemployment rate peak at a relatively modest 5.6%. This discrepancy can be partly attributed to the ability to work remotely, a privilege enjoyed predominantly by degree holders. At the height of the pandemic in May 2020, degree holders accounted for a staggering 73% of all workers working from home due to shutdowns (BLS).

Fast forward to May 2023, unemployment rates across educational groups have dramatically decreased, mirroring pre-pandemic levels. However, for STAR workers, this decline is largely attributed to a significant contraction in the labor force. As of May 2023, the 12-month average labor force was down 239,000 workers with just a high school diploma and some college or associate degree compared to December 2019 (*Figure 21*). This contraction is a result of both declining populations and falling labor force participation rates among these groups. On the other hand, the labor force of workers with a bachelor’s degree or higher grew by 147,000 between December 2019 and May 2023.

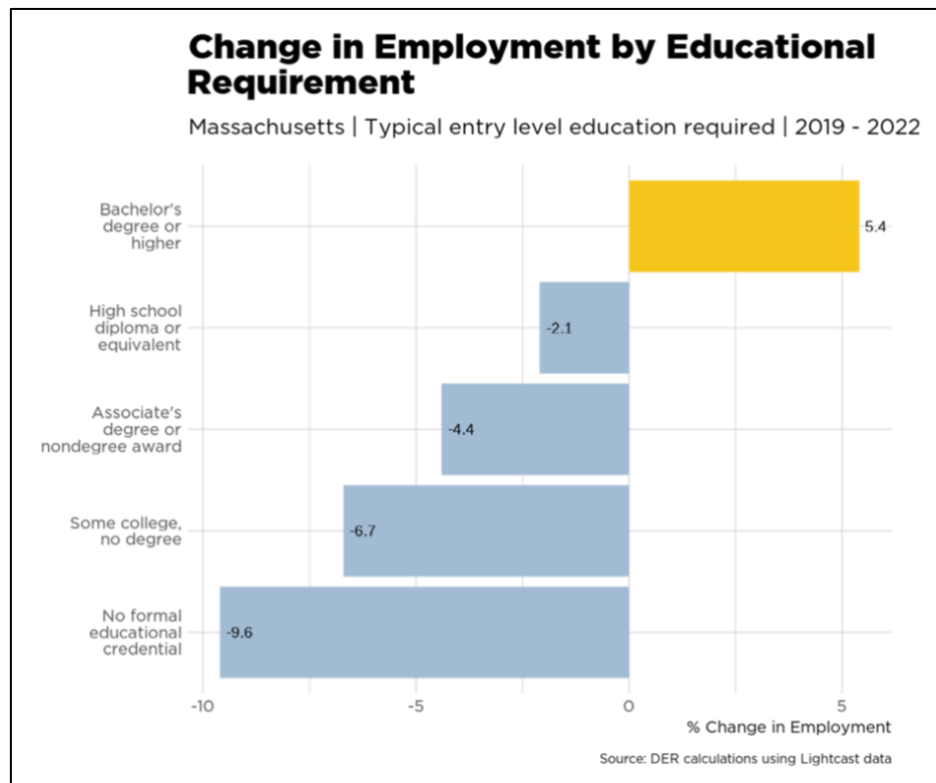
Figure 21



This trend can be partly explained by labor force shifts across age groups. Given the rise in educational attainment and college enrollment rates over time, older workers are less likely to have gained skills through alternative routes. In 2019, workers aged 55 and older made up one-third of the STAR workers in the labor force. As previously noted, labor force participation among workers aged 55 and older saw a significant decline between 2019 and 2023.

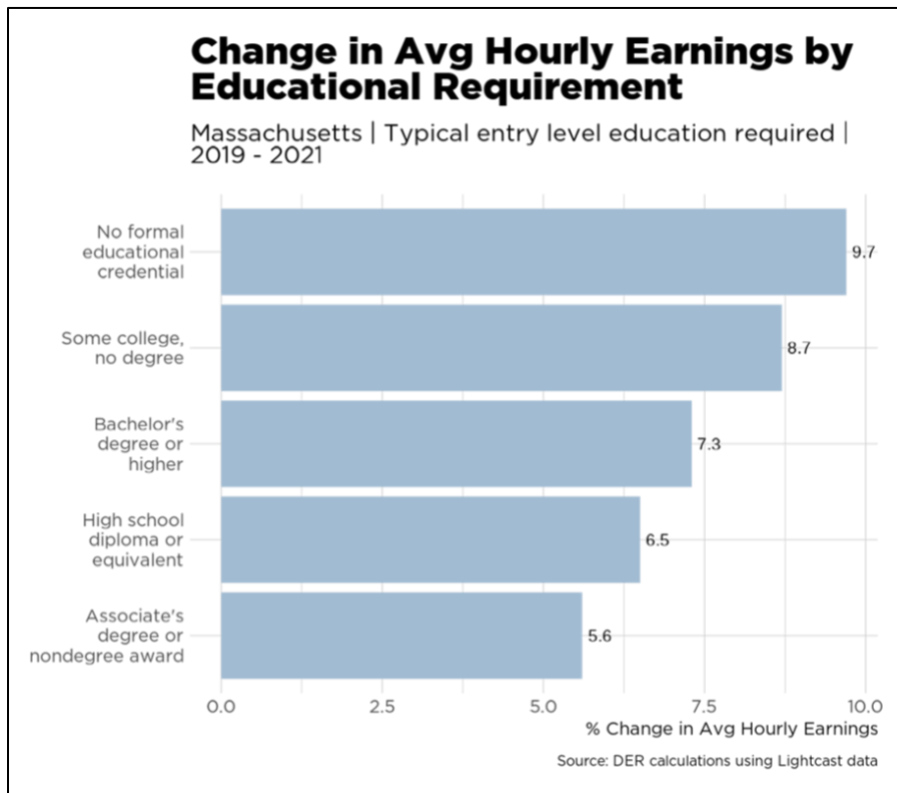
Another factor contributing to these shifts could be changes in employment across occupations requiring varying degrees of education. From 2019 to 2022, employment in occupations typically requiring a college degree increased by 5.1%, while it declined among occupations typically requiring less than a bachelor's degree or no credential at all (*Figure 22*).

Figure 22



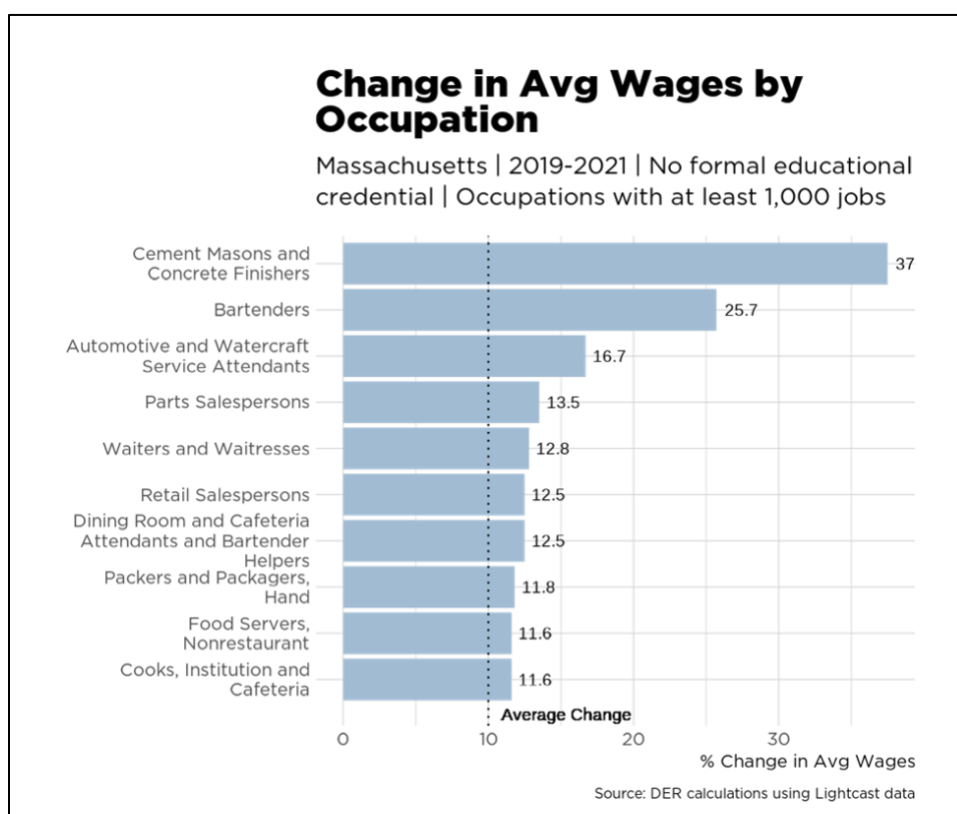
Interestingly, while employment among occupations not requiring a bachelor's degree has lagged, wage data shows demand was high for these occupations during the early stages of the pandemic recovery. Between 2019 and 2021, average hourly earnings increased by 9.7% and 8.7% for occupations typically requiring no formal education or some college but not a degree, compared to 7.3% for jobs requiring a bachelor's degree (*Figure 23*).

Figure 23



Among occupations not requiring a formal educational credential, nearly 20 experienced increases in average wages that exceeded the average for all occupations from 2019 to 2022. These occupations spanned various sectors, from construction and retail to accommodation and food services (*Figure 24*). These jobs are concentrated in industries that were hardest hit by the pandemic and have been slow to return to pre-pandemic employment. These trends are consistent with the concern that labor supply issues have slowed recovery.

Figure 24



Despite these shifts, jobs not typically requiring a bachelor's degree still accounted for two-thirds of all jobs in Massachusetts in 2022 (Lightcast). For every STAR worker in Massachusetts, there were two jobs that do not typically require a bachelor's degree in 2022. As a result, STAR workers are often competing against workers with a bachelor's degree for jobs in several key occupations. For example, in sales and related occupations and office and administrative support occupations—two of the largest occupation groups in terms of employment—roughly one-third of workers have a bachelor's degree even though most occupations within these groups generally do not typically require a bachelor's degree (*Table 34*).

Figure 25

Educational Requirements vs Educational Attainment of Workers Across Occupations in Massachusetts - 2021

Occupation Group	Share of employment in occupations that typically require a bachelor's degree	Percent of workers that have a bachelor's degree	Percent difference in median income between those with and bachelor's degree and STAR workers	Total Employment
Construction and Extraction Occupations	0%	9%	-12%	160,436
Building and Grounds Cleaning and Maintenance Occupations	0%	10%	7%	127,863
Production Occupations	0%	10%	15%	152,783
Installation, Maintenance, and Repair Occupations	0%	12%	17%	113,743
Transportation and Material Moving Occupations	0%	13%	-7%	232,473
Health care Support Occupations	0%	15%	9%	206,022
Food Preparation and Serving Related Occupations	0%	16%	20%	251,102
Personal Care and Service Occupations	0%	22%	9%	101,871
Office and Administrative Support Occupations	0%	32%	12%	443,226
Protective Service Occupations	0%	41%	42%	82,078
Farming, Fishing, and Forestry Occupations	1%	28%	5%	11,537
Sales and Related Occupations	8%	37%	114%	319,520
Arts, Design, Entertainment, Sports, and Media Occupations	73%	71%	60%	74,252
Health care Practitioners and Technical Occupations	73%	71%	45%	255,998
Legal Occupations	74%	86%	100%	39,946
Educational Instruction and Library Occupations	76%	79%	156%	268,563

Architecture and Engineering Occupations	77%	77%	25%	71,709
Community and Social Service Occupations	81%	75%	54%	94,416
Computer and Mathematical Occupations	86%	80%	37%	157,727
Life, Physical, and Social Science Occupations	92%	90%	34%	63,645
Management Occupations	94%	72%	56%	371,396
Business and Financial Operations Occupations	97%	79%	43%	277,771
Source: Employment based on typical educational requirement – DER calculations of <i>Lightcast</i> data; Share of workers with a bachelor's degree – 2021 1yr ACS PUMS; Difference in median income by educational attainment – 2021 1yr ACS PUMS; Total employment by occupation – <i>Lightcast</i> .				

The competition for jobs that don't typically require a bachelor's degree from degree-holders could be attributed to several factors. One possibility is the saturation of the job market for roles that require a degree, leading degree-holders to broaden their job search. Another factor could be the appeal of certain non-degree jobs due to factors like flexible work hours, work-life balance, or opportunities for on-the-job training and advancement. Further research could delve into these factors, surveying degree-holders in non-degree jobs to understand their motivations and experiences.

Additionally, workers with a bachelor's degree tend to make significantly more than those without in these occupations. In sales and related occupations, the median income for workers with a bachelor's degree was 114% greater than STAR workers. In Food Preparation and Serving Related Occupations, workers with a bachelor's degree make up 16% of the workforce and have median earnings that are 20% greater than STAR workers. In contrast, there are two occupation groups where STAR workers earn a premium over those that have a bachelor's degree: construction and extraction occupations and transportation and material moving occupations.

Wage disparities between bachelor's degree-holders and STAR workers in the same occupation could be influenced by a variety of factors. Employers may value the broader skill set or perceived competence associated with a degree, leading to higher initial salaries or faster advancement for degree-holders. Alternatively, degree-holders may be more likely to negotiate for higher wages or to select higher-paying jobs within an occupational group. On the other hand, in occupations like construction and extraction, practical experience and skills might be more valued than formal education, leading to higher wages for STAR workers.

These findings underscore the importance of skill development for workers in occupations that don't typically require a bachelor's degree. While the number of such jobs is

substantial, the competition from degree-holders can be intense. For workers in occupations that don't typically require a bachelor's degree, skill development can be a key strategy for improving income and job prospects.

Low-Income Workers

In 2022, there were an estimated 1.7 million working age individuals—including 1 million in the labor force—that met the WIOA low-income eligibility (ACS). These individuals include those living in low-income households, those receiving public assistance (e.g., SNAP, TANF), young people eligible for free and reduced lunch, and people with disabilities earning low incomes.

The economic analysis of low-income workers in Massachusetts reveals several key insights and implications.

Firstly, the labor market outcomes for low-income workers are significantly worse than for the rest of the population. With an unemployment rate of 7.8% compared to 2.7% for the rest of the population, and a labor force participation rate of 52.6%, the data suggests that low-income workers face substantial barriers to employment. This is further underscored by the fact that over 700,000 low-income individuals of working age are not participating in the labor market.

Secondly, these disparities are largely driven by a range of barriers that limit labor market opportunities for low-income workers. These include language difficulties, disabilities, and lower levels of educational attainment. The fact that low-income individuals are twice as likely to have difficulty speaking English and significantly more likely to have a disability than others in the labor force highlights the need for targeted interventions to address these barriers.

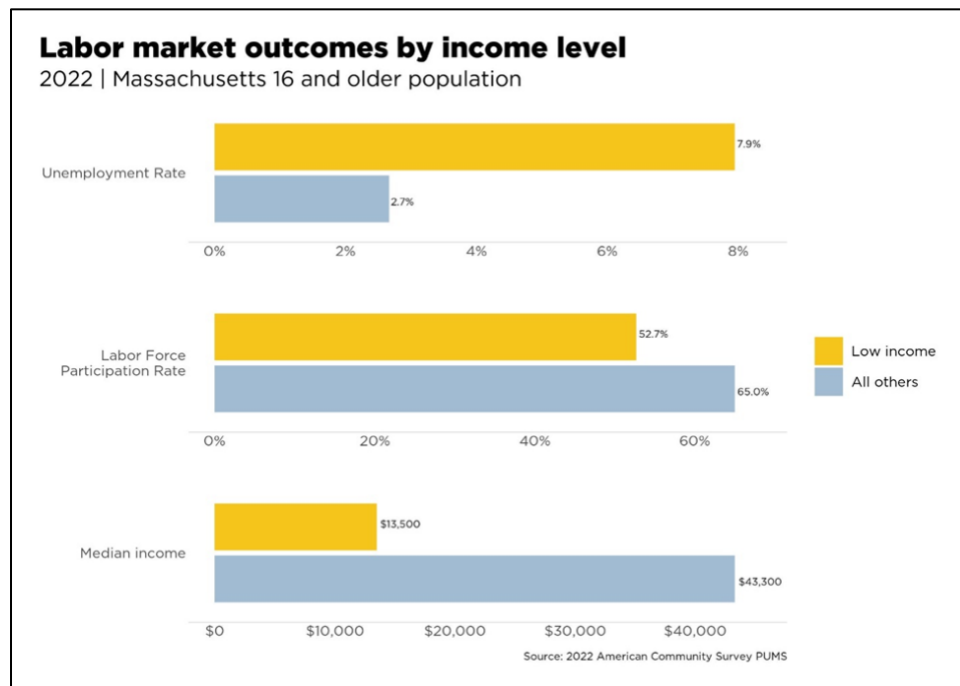
Thirdly, the data suggests a significant underemployment problem among low-income workers. Despite 40% of low-income workers having a bachelor's degree, which is higher than the national average, many are working in low-wage jobs that do not require such a degree. This indicates a mismatch between the skills of these workers and the jobs they are doing, suggesting the need for policies to better align education and training with labor market needs.

Fourthly, the analysis reveals a racial disparity in low-income employment, with Black and Hispanic or Latino individuals being twice as likely to be low-income workers. This points to the need for strategies to address racial disparities in the labor market.

Finally, low-income workers are overrepresented in lower-paying occupations such as food preparation and serving, transportation and material moving, and health care support. This suggests the need for policies to improve wage levels in these sectors and to provide pathways for low-income workers into higher-paying occupations.

Low-income workers experience worse labor market outcomes than the rest of the population. In 2022, low-income working age population had an unemployment rate of 7.8%, compared a 2.7% unemployment rate among the rest of the population (Figure 26). Additionally, low-income individuals were much less likely to participate in the labor force compared to others, experiencing a 52.6% labor force participation rate, with more than 700,000 low-income working aged individuals sitting out of the labor market.

Figure 26

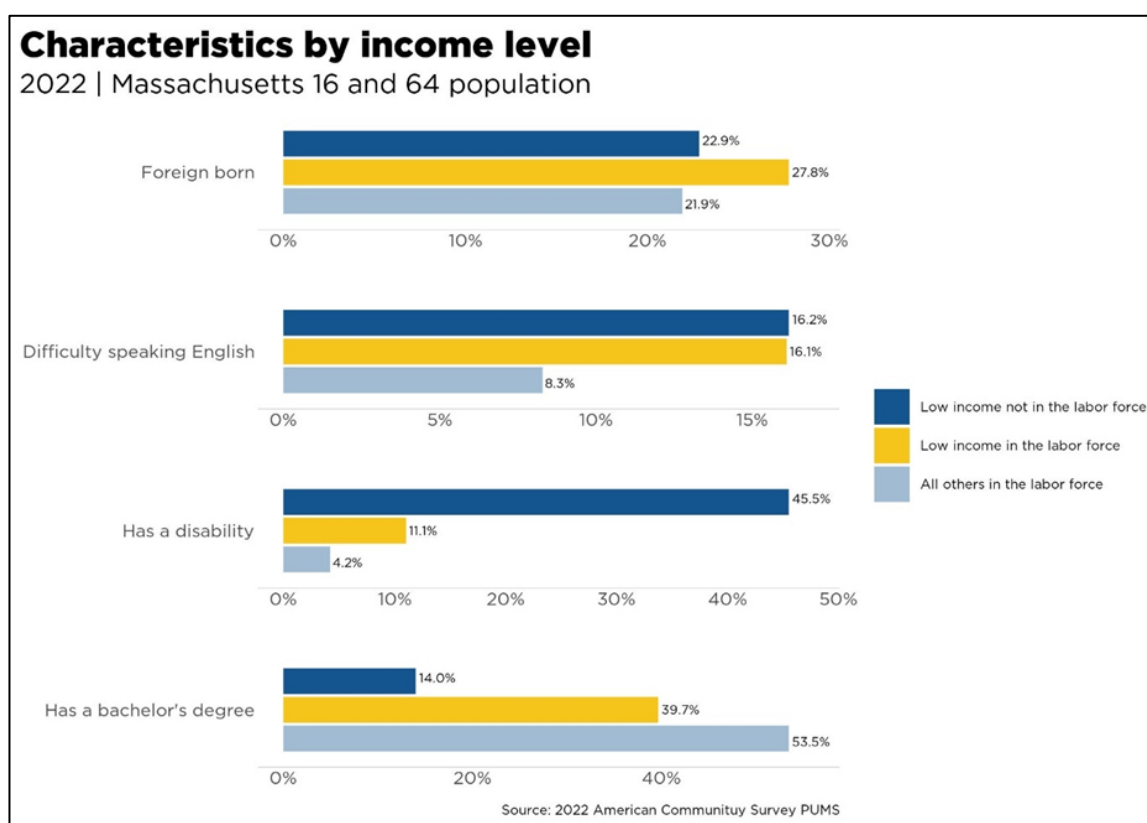


The disparities observed in labor market outcomes can be attributed to a variety of factors that disproportionately affect low-income workers, limiting their opportunities for gainful employment. A significant portion of low-income individuals in the labor force are foreign-born, which often leads to language barriers. In 2022, it was observed that low-income individuals were twice as likely as their counterparts to face challenges with English proficiency. This language barrier can limit their access to higher-paying jobs, as it may hinder effective communication in the workplace, thus leading to lower labor market incomes.

Furthermore, low-income individuals are more likely to have a disability compared to the rest of the labor force. This is a significant factor as it can limit their ability to perform certain tasks or restrict them to specific types of jobs, often those that are lower paying. For instance, low-income workers were found to be twice as likely to have a disability compared to other workers. This disparity is even more pronounced among low-income individuals who are not part of the labor force, as they are 10 times more likely to have a disability compared to the rest of the labor force. This could be due to a lack of access to adequate health care, rehabilitation, or other support services, which can further exacerbate their economic situation and contribute to lower labor market incomes.

Finally, low-income workers are less likely to have a bachelor's degree. Just 16% of low-income individuals that are not in the labor force had a bachelor's degree, suggesting that educational attainment and the need for skills development could be a barrier for this group. At the same time, the educational attainment level for low-income workers that are already in the labor force is relatively high. In 2022, 40% of low-income workers had a bachelor's degree which was higher than the share of all people in the labor force nationally that have a bachelor's degree (37.1%). This suggests that there are many underemployed individuals who have a bachelor's degree but are working in low-wage jobs that do not require a bachelor's degree. This dynamic is consistent with the data presented in the previous section noting that large share of bachelor's degree holders working on occupations that typically do not require a bachelor's degree.

Figure 27

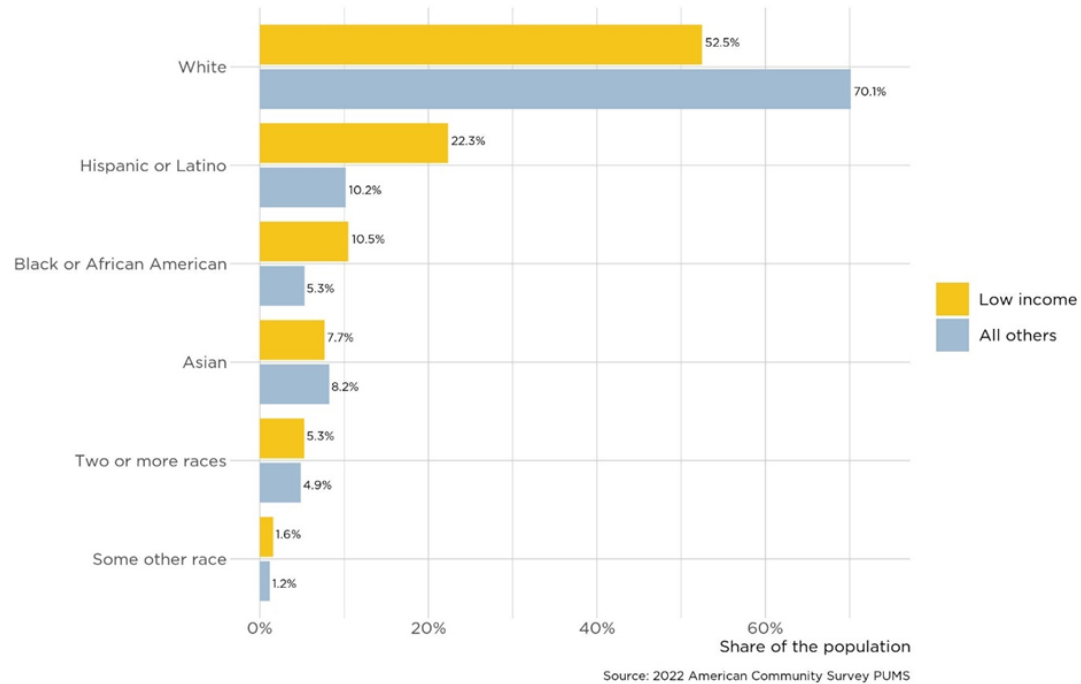


The representation of Black and Hispanic or Latino individuals is notably higher among low-income workers (*Figure 28*). In 2022, the likelihood of low-income working-age individuals being Black or Hispanic or Latino was twice as high compared to all other working-age individuals. Collectively, these two groups constituted over 30% of the low-income working-age population.

Figure 28

Race and ethnicity by income level

2022 | Massachusetts 16 - 64 population



Low-income workers are employed across occupations and industries but tend to be overrepresented in lower paying occupations. Employed low-income workers were much more likely to work in food preparation and serving, transportation and material moving, and health care support occupations than workers earning higher incomes. Conversely, low-income workers are less likely to be employed in management occupations which tend to be higher paying, although nearly 10% of low wage workers work in management roles.

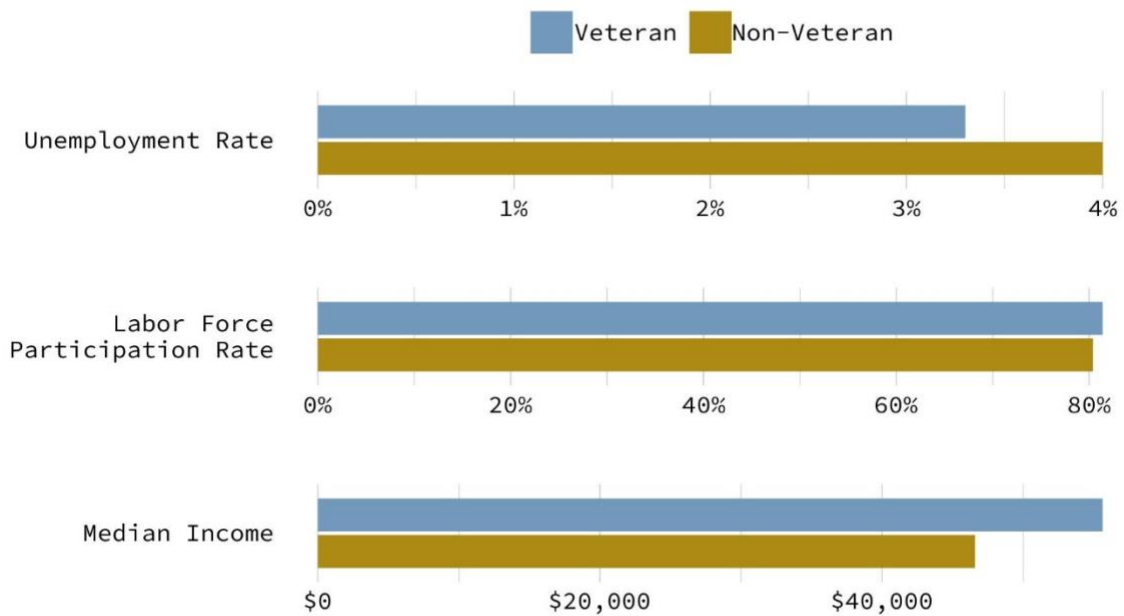
VETERANS

In 2022, there were 102,000 working age Veterans in Massachusetts (ACS). On average, Veterans tend to have better labor market outcomes than the non-Veteran population. In 2022, the Veteran population had an unemployment of 3.3%, compared to 4.0% among the non-Veteran population (Graphic 1). The labor force participation rate among Veterans was 81.4%, compared to 80.4% among the non-Veteran population (Graphic 1). Additionally, median income among Veterans was \$55,634 in 2022, 19% greater than the non-Veteran population (Graphic 1).

Graphic 1

Labor market outcomes among the Veteran population

Massachusetts | 2022



Source: American Community Survey 2022 1yr Sample

Yet, many Veterans still face barriers in the labor market. In 2022, a smaller percentage of Veterans in Massachusetts held a bachelor's degree compared to the non-Veteran population (36% vs. 47%). This educational gap impacts earnings; Veterans with a bachelor's degree earn a median income 57% higher than those without (ACS PUMS). With 30% of Veterans already possessing some college or an associate's degree (compared to 21% for non-Veterans), there's a strong foundation to help veterans build upon their credentials and obtain a bachelor's degree.

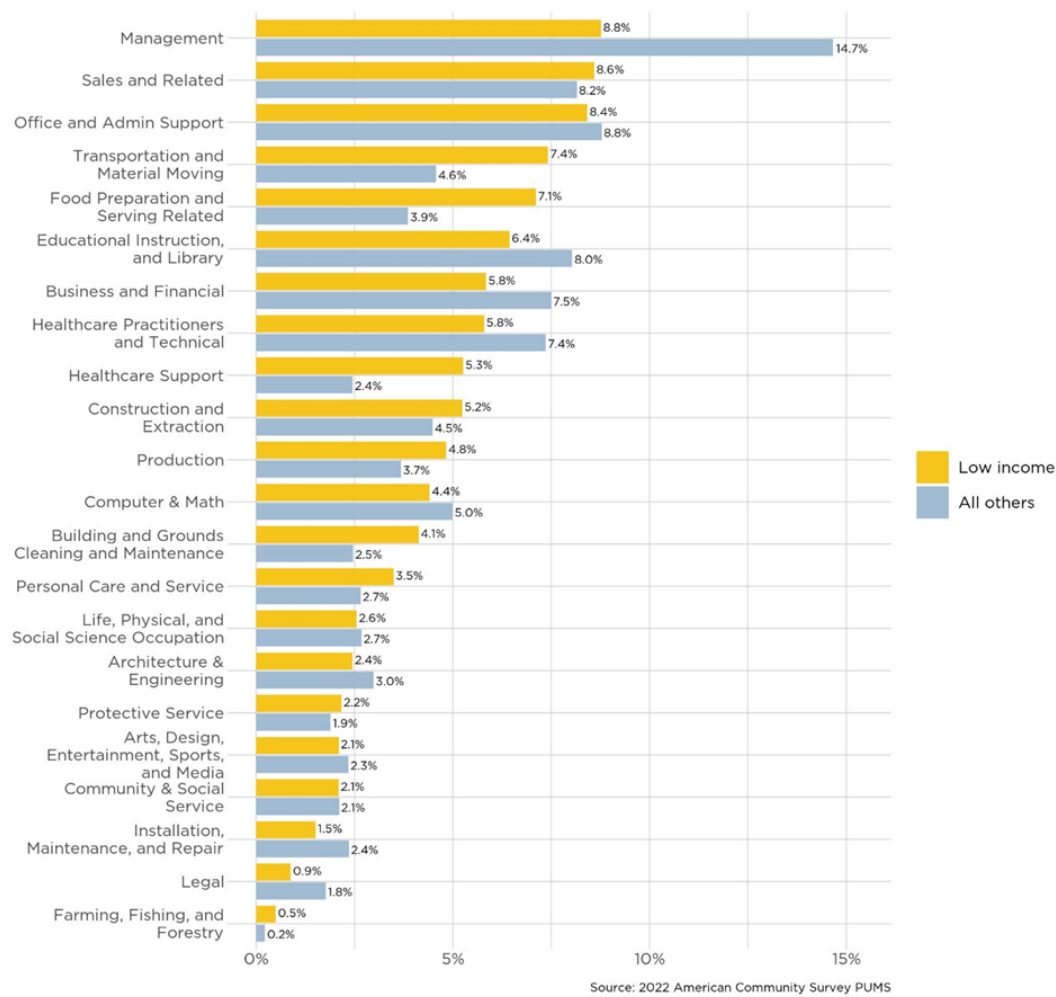
Many Veterans experience disabilities related to their service which can impact the labor market outcomes. In 2022, 23.4% of working age Veterans reported a service-related disability. The experience of disability is highly correlated to the experience of poverty among Veterans. In 2022, 6.1% of working-age Veterans had income below the poverty line, compared to 9.8% of the non-Veteran population. Yet, among worker-age Veterans with income below the poverty line, 43.5% reported a disability, compared to 27.1% among the non-Veteran population.

While statistics show generally positive labor market outcomes for Massachusetts Veterans, challenges remain. Addressing educational gaps and the effects of service-related disabilities are crucial. Supporting Veterans in these areas will not only honor their service but will ensure a strong and equitable workforce for our state.

Figure 29

Employment by occupation and income level

2022 | Massachusetts employed population



Massachusetts' economy and labor market have undergone unprecedented changes due to the shock of the pandemic, resulting in labor market tightness, an uneven employment recovery, and the highlighting of an aging workforce. Naturally, these broad economic trends also have a direct impact on the occupational job market. By anticipating future occupational demands, the workforce development system can strategize to address labor force gaps, by devoting more resources to train workers for current or new positions.

Projected Annual Job Openings as a Forward-Looking Labor Market Indicator

Annual job openings are a forward-looking measure that predicts the number of vacancies anticipated in each occupation, based on short-term projections by the Massachusetts Department of Economic Research (DER). These openings represent potential opportunities for job seekers. These can stem from separations in existing roles (like labor force exits and job transfers) or from the creation of new positions. It's worth noting the distinction between job openings and job postings: both indicate the demand for an occupation but are derived and utilized differently. While job openings are designed to anticipate future annual

demand—encompassing job creation and separations—job postings capture the present momentum of the job market and are less suited to be used as a forward-looking measure.

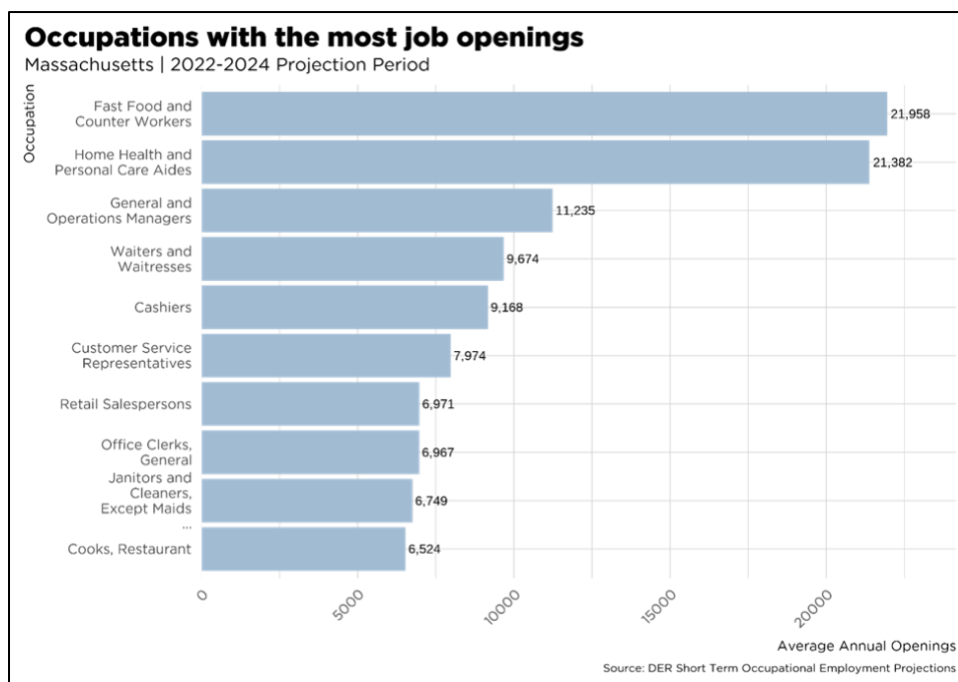
The projected job openings are composed of the following elements:

- **Net job growth/decline:** This element estimates the number of openings due to the expected net change in employment related shifts in demand for the occupation.
- **Labor market exits:** This element estimates the expected number of openings due to workers leaving their role and the labor market. This is predominantly driven by retirement, but also captures workers who leave the labor market to pursue education or because of illness or family care responsibilities.
- **Transitions:** This element estimates the number of openings due to workers leaving their current occupation to take a job in another occupation.

Top Occupations by Projected Annual Job Openings

In Figure 30, the occupations with the top projected annual job openings were mainly occupations that do not typically require a bachelor's degree, with general and operations managers being the exception. It should be noted that these occupations are largely within the accommodation and food services sector such as fast food and counter workers, waiters and waitresses, and restaurant cooks with projected annual openings of 21,958, 9,674, and 6,524 respectively.

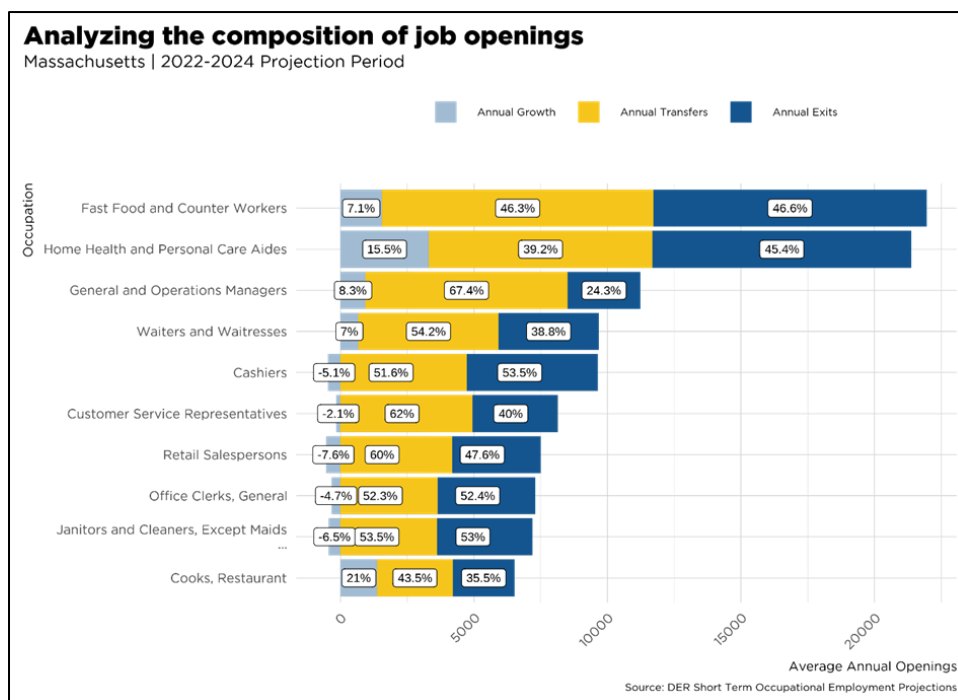
Figure 30



The projected demand as measured by openings may be influenced by turnover in the occupation related to low pay. The median hourly earnings in 2022 for fast food workers, health care aides, and waiters/waitresses were \$16.04, \$16.40, and \$16.55, respectively. These figures fall considerably short of the \$21.35 living wage estimate for an adult with no children in Massachusetts according to MIT's Living Wage Calculator.

In addition, low pay contributes to higher turnover as well as reasons such as limited advancement opportunities and feeling disrespected at work according to a [2021 Pew Research Study](https://www.pewresearch.org/short-reads/2022/03/09/majority-of-workers-who-quit-a-job-in-2021-cite-low-pay-no-opportunities-for-advancement-feeling-disrespected/). [pewresearch.org/short-reads/2022/03/09/majority-of-workers-who-quit-a-job-in-2021-cite-low-pay-no-opportunities-for-advancement-feeling-disrespected/](https://www.pewresearch.org/short-reads/2022/03/09/majority-of-workers-who-quit-a-job-in-2021-cite-low-pay-no-opportunities-for-advancement-feeling-disrespected/) For these top 10 occupations, the 2022 average turnover rate, excluding general and operations managers, was 96%, compared to the overall average of 61% across all occupations (*Lightcast*). This higher rate suggests that within an occupation of about 100 workers, 96 leave within a given year, supporting higher projected openings.

Figure 31



In analyzing the composition of job openings for occupations with the highest numbers of openings, factors tied to job separations, such as labor force exits and job transfers, emerged as the primary drivers of projected job openings. These overshadowed new job growth (as depicted in *Figure 31*). Among the occupations with the most projected openings, the typical occupation comprised approximately 51% from job transfers, 44% from labor force exits, and just 5% from new growth. The BLS indicates that such a composition of job openings is standard since labor force exits and occupational transfers generally outpace new growth ([BLS](https://www.bls.gov/opub/mlr/2019/article/occupational-separations.htm)) [bls.gov/opub/mlr/2019/article/occupational-separations.htm](https://www.bls.gov/opub/mlr/2019/article/occupational-separations.htm). Thus, assessing the projected demand of an occupation based solely on its annual growth rate might not provide a complete picture unless one also considers the impact of labor force exits and job transfers. For instance, while there was negative occupational growth for roles such as cashiers, retail salespersons, and janitors/cleaners (indicating a potential reduction in the overall employment within these occupations), the demand remains strong. This robust demand is due to the significant number of openings resulting from exits and transfers.

For fast food worker projected annual openings, 47% arose from labor force exits, 46% from job transfers, and 7% from new job growth (*Figure 27*). Similarly, for home health/personal care aides, 45% were due to labor force exits, 39% from job transfers, and 16% from job growth.

Additionally, the industry's dependence on younger demographics can lead to elevated job vacancies, especially as these workers pursue diverse professions aligned with their aspirations or financial goals. The BLS highlights age as a key determinant of occupational transfers, with individuals aged 16-24 showing the highest propensities to make such transitions as they shape their career trajectories. In 2022, a striking 47% of fast-food

workers were under the age of 25, in stark contrast to the average 12% in the same age bracket across all occupations.

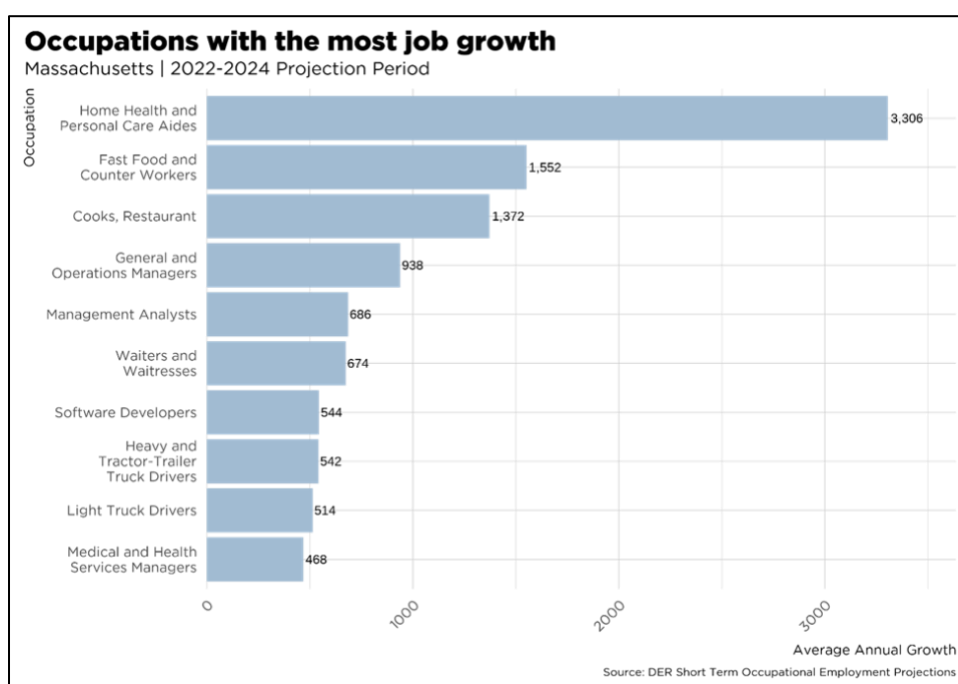
Employers, in their bid to address staffing challenges in the restaurant sector, have increased monthly average wages, from \$2,159 in Q3 2019 to \$2,811 in Q3 2022, reflecting a 30% increase over three years (QWI). In parallel with wage boosts, the fast-food sector is also pivoting towards tech solutions, integrating self-service kiosks to mitigate labor shortfalls.

In comparison, home health and personal care aides also deal with issues related to low wages, arduous work, and transportation difficulties especially during the pandemic ([Taube and Lipson](#)) [pw.hks.harvard.edu/post/ma-health-care-workforce](https://www.hks.harvard.edu/post/ma-health-care-workforce). However, there have been attempts to augment labor supply through wage increases as median hourly wages grew from \$15.01 in 2019 to \$17.45 in 2021, representing a 16.3% rise over two years, although that wage fell to \$16.40 in 2022. Unlike the fast-food industry, home health care agencies depend on predetermined Medicare reimbursement rates dictated by federal law. Thus, the ability of home health care agencies to determine their workers' wages based on market dynamics is somewhat constrained, compared to the more freely operating labor market for fast food workers.

Occupations with Most Projected Growth in New Positions

Home health and personal care aides have the highest projected annual growth of new positions in the state as shown in Figure 32. While the job's low pay and modest pay trajectory might impede growth from a labor supply standpoint, the increasing elderly population in Massachusetts is likely to sustain the demand for these roles. As of 2021, 17.4% of the Massachusetts population was aged 65 and older (according to the 2021 ACS 1-year estimate). Based on a [2014 aging report mass.gov/doc/mass-healthy-aging-data-report-community-profiles-commissioned-by-tufts-health-plan-0/](#) by the University of Massachusetts Boston, this proportion is projected to rise to 21% by 2030.

Figure 32



Furthermore, the home health and personal care aide sectors have a significant reliance on the foreign-born workforce. Specifically, 37% of home health aides and 34% of personal care aides are foreign-born. This is notably higher than the 22% representation of foreign-born workers in the overall Massachusetts workforce, as per the 2021 1-year ACS PUMS data.

Other professions witnessing notable projected annual growth are management analysts and software developers. The growth of these bachelor's degree-enabled occupations has been bolstered by the surge of the professional and business services sector, which has benefited from providing remote services, leveraging AI technologies, and capitalizing on the strength of the biotech sector.

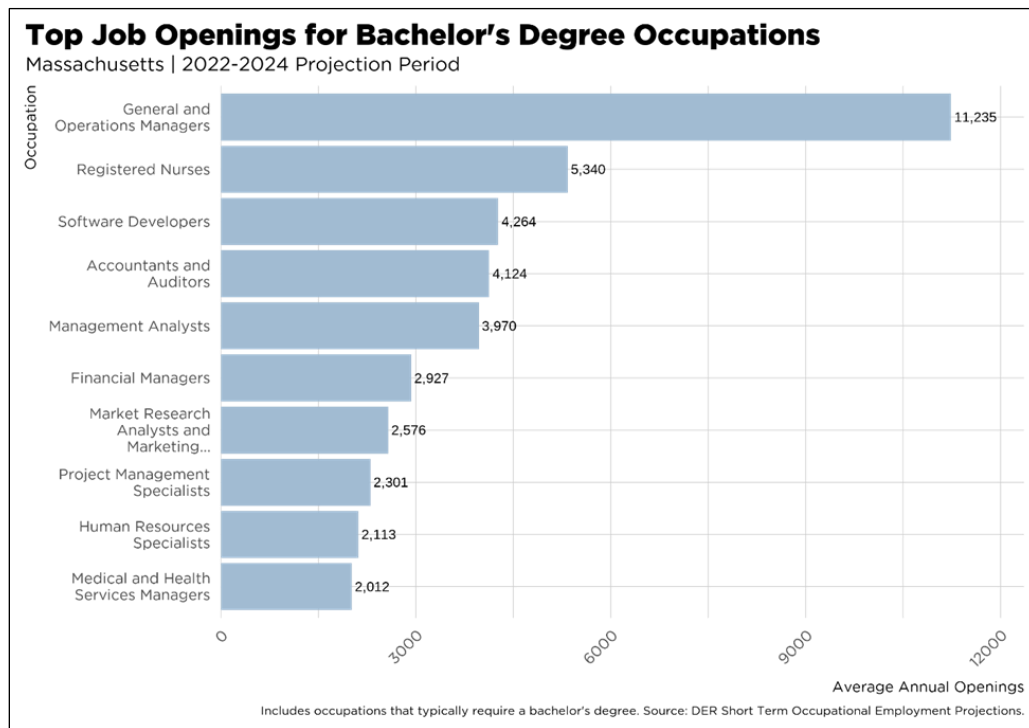
Lastly, the notable annual growth projected in the commercial truck driving profession—particularly light truck driving—can be attributed factors such as rising consumer demand and growth in the in online product and food delivery, which accelerated during the pandemic. According to the 2020 Census Bureau's Annual Retail Trade Survey (ARTS) census.gov/library/stories/2022/04/ecommerce-sales-surged-during-pandemic.html, e-commerce sales increased from \$571.2 billion in 2019 to \$815.4 billion in 2020, a year over year growth rate of 43%. Growing online consumption increases demand for last-mile logistics services.

Projected Openings for Jobs Requiring a bachelor's degree

While the occupations with the highest number of projected annual job openings primarily consisted of those that do not normally require a bachelor's degree for entry, Figure 33

focuses on the projected job openings for positions that typically do require a bachelor's degree. General and operations managers had, by far, the largest number of projected annual openings among those often requiring a bachelor's degree for entry, totaling 11,235. For context, general and operations managers were the most populous occupation in the state, boasting 120,280 jobs in 2022. They were followed by home health and personal care aides (107,220) and registered nurses (94,502).

Figure 33



While some occupations like home health aides and registered nurses have clearly defined training requirements and scopes of practice, general and operations managers have more ambiguous job duties that can include creating policies, overseeing operations, and coordinating resources and staff.

According to BLS occupational classification, the responsibilities of general and operations managers are too broad to align with managers who have functional specializations in areas like advertising, finance, or construction ([BLS](https://www.bls.gov/oes/current/oes111021.htm)) [bls.gov/oes/current/oes111021.htm](https://www.bls.gov/oes/current/oes111021.htm). Consequently, this general management category encompasses management roles that don't fit neatly into a specific definition. It spans many jobs across multiple sectors, with a significant presence in the professional, scientific, and technical services (17%) and retail trade (13%). Titles such as business managers or retail district managers fall under this category, solidifying it as the largest occupation in the state with the most projected openings for those typically requiring a bachelor's degree for entry.

Additionally, given the size of the health care industry, registered nurses had the second largest number of projected annual openings among jobs that often require a bachelor's degree for entry with 5,340 openings. Lastly, software developers bolstered by the growth

of the professional and business services sector and the widespread adoption of AI technologies have also seen high demand with 4,264 projected annual openings.

Aligning Projected Openings to In-Demand Skills

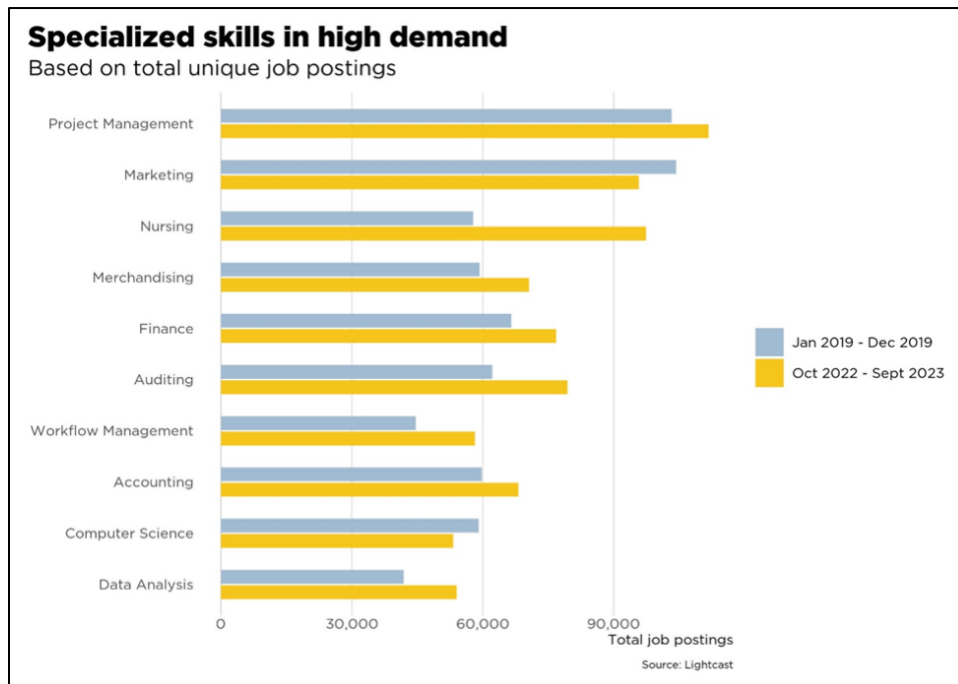
Several occupations with the highest projected job openings correspond with skills currently in high demand, indicating potential skills gaps. From October 2022 to September 2023, Massachusetts saw a surge in demand for specialized skills in project management, marketing, and nursing. This demand aligns with the high projected job openings in the roles of registered nurses, marketing specialists, and general and operations managers (Figure 34).

Other notable alignments between in-demand skills and occupations with high projected openings include:

- Finance, auditing, and accounting skills align with projected openings in the roles of accountants, auditors, and financial managers.
- Merchandising skills align with projected openings in retail sales occupations.
- Computer science and data analysis skills align with projected openings in software developer roles.

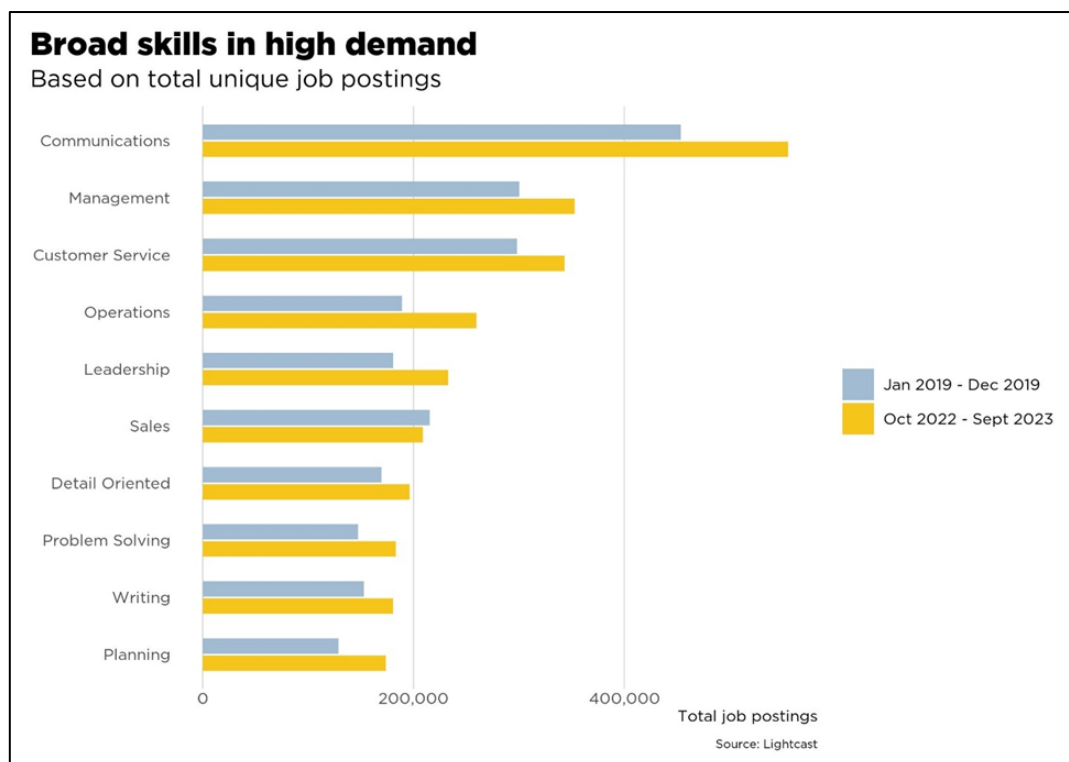
These skills gaps present opportunities to expand training in these areas, particularly for groups traditionally underrepresented in these occupations. These specialized skills often play a crucial role in career advancement and transitioning to new occupations.

Figure 34



In the post-pandemic period, there has been an increased demand for broad-based skills, particularly in areas such as communications, management, customer service, and operations (Figure 35). Providing support for skills development in these areas is critical to helping individuals who may face employment barriers develop the skills needed to secure jobs that require high-demand skills.

Figure 35



KEY SECTOR ANALYSIS

To better understand how job and workforce development opportunities align with the economic shifts discussed above, this analysis provides a deeper assessment of the industrial and occupational composition of four industry groups that have been identified as key sectors that are critical to the future economic growth of the state or are emerging sectors.

The first four industry groups considered are industries that have been prioritized by the state through the MassTalent initiative:

- **Advanced Manufacturing:** This industry group is composed of manufacturing industries that employ a high level of STEM occupations and engage in a high degree of research and development. This analysis uses definitions of advanced manufacturing industries published by the [Brookings Institution](https://www.brookings.edu/articles/americas-advanced-industries-what-they-are-where-they-are-and-why-they-matter/). [brookings.edu/articles/americas-advanced-industries-what-they-are-where-they-are-and-why-they-matter/](https://www.brookings.edu/articles/americas-advanced-industries-what-they-are-where-they-are-and-why-they-matter/)
- **Life Sciences:** This industry group that encompasses various fields such as advanced and applied sciences that expand the understanding of human physiology and have the potential to lead to medical advances or therapeutic applications. This analysis uses definitions of life sciences published by [MassBio](https://massbio.org/wp-content/uploads/2022/05/2022-MA-Life-Sciences-Workforce-Analysis-Report.pdf). massbio.org/wp-content/uploads/2022/05/2022-MA-Life-Sciences-Workforce-Analysis-Report.pdf
- **Health care:** This industry group encompasses ambulatory health care services, hospitals, and nursing and residential care facilities.

- **Clean Energy:** The clean energy sector encompasses organizations engaged in renewable energy, energy efficiency, alternative transportation, and carbon management technologies.

Across each of these industry groups, Massachusetts is nationally competitive, ranking among the top 10 states in 2022 for the share of employment in life sciences, health care, and clean energy (Quarterly Census of Employment and Wages). Within the key sectors, health care ranks as the largest share of overall employment in Massachusetts, followed by advanced manufacturing, life sciences, and clean energy. Among these sectors health care and clean energy were the hardest hit during the pandemic, with employment still lagging pre-pandemic levels in 2022. Although life sciences had the smallest share of employment in Q2 2022, it saw the greatest increase in employment between 2017 and 2022.

Several of these sectors are highly productive—as measured by Gross State Product (GSP) per worker—resulting in higher wages for workers and greater economic activity for the state. In 2022, advanced manufacturing (\$335,000) and life sciences (\$303,000) had GSP per worker that exceeded the state average of \$170,000 per worker. The GSP per worker in health care (\$113,000) and clean energy (\$136,000) fell below the state average. This is consistent with the fact that these industries primarily serve a local customer, whereas advanced manufacturing and life sciences have the potential to serve a global customer base. While the share of advanced manufacturing ranks Massachusetts lower compared to other states, it is the most productive among these industry groups.

ADVANCED MANUFACTURING

There are 35 industries within advanced manufacturing, employing a total of 121,059 workers in 2022.

Table 17

Advanced Manufacturing Occupations by Entry-Level Education

Typical Entry-Level Education	% Share Employment	# of Occupations	Avg. Median Hourly Wage
High School Degree	47.3	126	\$24.65
Bachelors	41.6	90	\$51.27
Associates	4.2	20	\$30.41
No Formal Educational Credential	2.8	19	\$20.04
Postsecondary Non-Degree Award/ Certificate	1.4	10	\$28.40
Some College, No Degree	1.4	4	\$24.94
Advanced Degree	1.2	7	\$56.44
Source: DER calculations using <i>Lightcast</i> data. Excludes occupations with fewer than 10 employed. 2022 employment data. Wage data sourced from 2021 statistics.			

While examining a cross-section of advanced manufacturing occupations, it is notable that many of these jobs are relatively accessible to those with varying levels of educational achievement (*Table 17*). Of the employment in advanced manufacturing, 50.1% typically require a high school degree or no formal degree. In 2021, the average median hourly wage for advanced manufacturing occupations typically requiring a high school degree was

\$24.65, a livable wage for a single adult with no children in the state of Massachusetts, [according to MIT's Living Wage Calculator. https://livingwage.mit.edu/states/25](https://livingwage.mit.edu/states/25) In contrast, advanced manufacturing occupations that normally require a bachelor's degree or higher encompass the more technical engineering work as an industrial engineer or software developer, offering average median hourly wages of \$51.27 and \$56.44, respectively, for those with bachelor's and advanced degrees.

In terms of geography, advanced manufacturing employment is distributed towards the eastern part of the state. Approximately 60% of all advanced manufacturing employment is in Middlesex and Essex counties, which is a short distance from the Boston metropolitan area. The top cities for advanced manufacturing employment include Andover, with Pfizer and Raytheon manufacturing facilities; Hopkinton, home to Dell Technologies and PerkinElmer offices; and Marlborough, where the Boston Scientific headquarters and Raytheon offices are situated. Together, these cities comprise 15,971 jobs, accounting for 13.2% of total advanced manufacturing employment. Based on job postings from July 2022 to July 2023, these top cities have primarily recruited for positions such as software developers, computer-related occupations, engineers, and marketing managers.

Table 18

Advanced manufacturing occupations with the most 2022 employment

Occupation	Employment (2022)		% Growth (2019-2022)	Projected Annual Opening	Median Hourly Earnings	Typical Entry-Level Education
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	9,074		-0.2	970	\$22.38	High School Degree
Miscellaneous Assemblers and Fabricators	8,931		22.4	998	\$17.70	High School Degree
Industrial Engineers	6,332		7.4	448	\$48.35	Bachelors
Software Developers	4,977		-12.9	350	\$61.62	Bachelors
General and Operations Managers	3,966		22.3	370	\$60.58	Bachelors
Inspectors, Testers, Sorters, Samplers, and Weighers	3,891		15.8	423	\$22.95	High School Degree
First-Line Supervisors of Production and Operating Workers	3,154		7.9	375	\$31.95	High School Degree
Machinists	2,406		2.0	299	\$27.71	High School Degree
Mechanical Engineers	2,280		-17.2	146	\$48.49	Bachelors
Electrical Engineers	2,133		-6.1	178	\$58.03	Bachelors

Although the advanced manufacturing sector offers opportunities for individuals with varying levels of education, the nature of the work involved can differ significantly. Occupations that do not often require a bachelor's degree, such as electrical, electronic, and electromechanical assemblers, assemblers and fabricators, inspectors/testers, and machinists, are usually found on the production floor (Table 18). On the other hand,

occupations which commonly require a bachelor's degree, such as industrial engineers, software developers, and general managers, are found in technical or strategic planning roles guiding the production process. These diverse employment opportunities present the workforce development system with the opportunity to integrate workers into the production level or enhance their skills as engineers or other technical staff.

There are 970 projected annual openings for the largest occupation—electrical, electronic, and electromechanical assemblers (Table 18). As the job growth for electrical, electronic, and electromechanical assemblers has seen a slight decline, most of the projected annual job openings were driven by labor force exits and occupational transfers. There were also a sizable number of projected annual openings for miscellaneous assemblers and fabricators, totaling 998, with the majority driven by occupational transfers.

Skills data shows that much of the current demand within advanced manufacturing is coming from life sciences engaged in manufacturing. Related to pharmaceuticals, [Good Manufacturing Practices](https://lightcast.io/open-skills/skills/BGS216CEA244DEE0A1AA/current-good-manufacturing-practices-cgmps) <https://lightcast.io/open-skills/skills/BGS216CEA244DEE0A1AA/current-good-manufacturing-practices-cgmps> (a set of guidelines specific to drug manufacturing) and biotechnology are among the most in-demand in advanced manufacturing (*Figure 36*). Other skills related to project management, new product development, data analysis, auditing, computer science, and automation reflect many of the cross-cutting skills needed across advanced manufacturing.

Figure 36

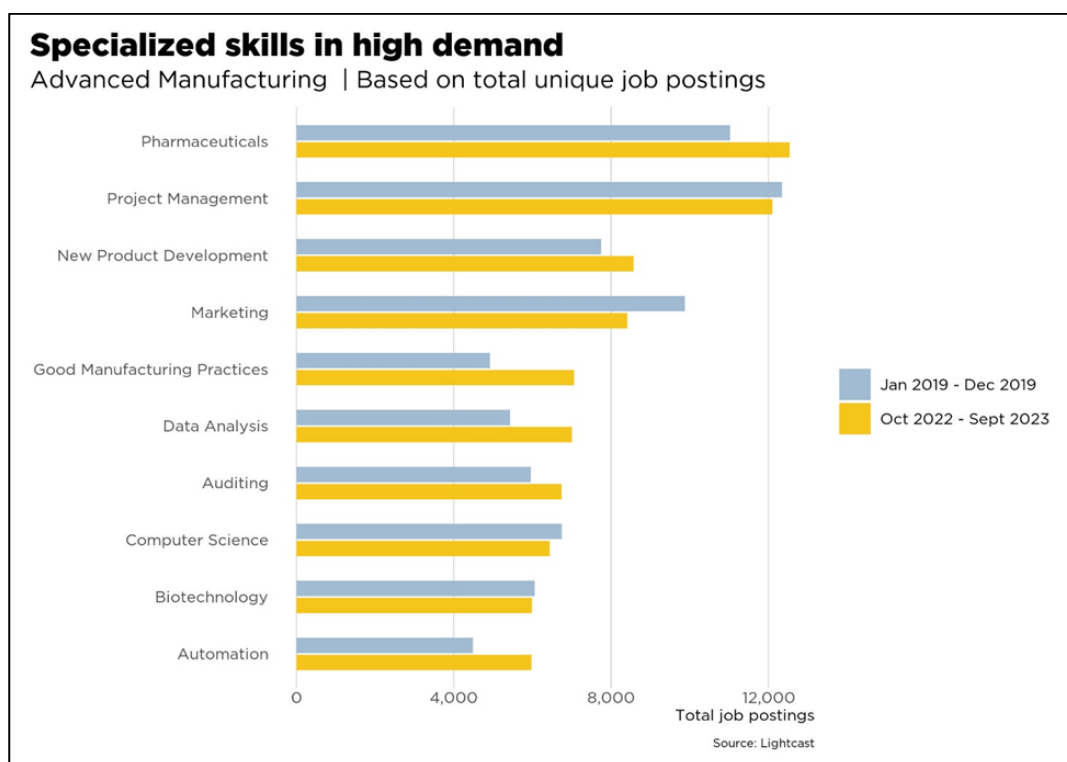


Table 19

Top advanced manufacturing industries

Industry	Employment (2022)	% Growth (2019-2022)	GSP per Worker ¹	Avg. Earnings Per Job ²
Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	26,642	4.3	\$426,690	\$165,743
Semiconductor and Other Electronic Component Manufacturing	14,457	-0.4	\$261,200	\$158,924
Medical Equipment and Supplies Manufacturing	10,938	-4.3	\$278,367	\$150,925
Pharmaceutical and Medicine Manufacturing	10,171	23.6	\$696,004	\$217,199
Aerospace Product and Parts Manufacturing	10,091	-8.3	\$273,157	\$176,602
Other Miscellaneous Manufacturing	8,209	-3.2	\$152,417	\$109,634
Computer and Peripheral Equipment Manufacturing	6,569	-24.6	\$324,287	\$236,380
Industrial Machinery Manufacturing	5,382	23.4	\$274,882	\$171,673
Other Electrical Equipment and Component Manufacturing	3,763	-3.8	\$233,164	\$127,730
Other General Purpose Machinery Manufacturing	3,483	-13.1	\$211,727	\$110,996
Commercial and Service Industry Machinery Manufacturing	3,325	13.7	\$179,505	\$130,868
Source: DER calculations using <i>Lightcast data</i> . Only includes industry greater than 2,000 jobs.				
¹ 2022				
² 2021				

In terms of industries within the sector, the navigational, measuring, electromedical, and control (NMEC) instruments manufacturing industry stands as the main industry within advanced manufacturing, employing approximately one-quarter of the advanced manufacturing workforce (Table 19).

This industry comprises companies engaged in the production of a range of products used to conduct scientific and medical research such as measurement tools (like thermometers and gauges), electromedical devices (including medical diagnostic equipment), and control instruments utilized in robotics and automation. Prominent examples of companies operating in this industry include Raytheon Technologies, Thermo Fisher Scientific Inc., and Waters Corporation. Within this sector are various occupations, including product engineers responsible for design and development, scientists and researchers driving innovation, technicians who assemble and test the products, and production workers involved in the manufacturing process.

As established earlier, within the five industry groups from 2017 to 2022, advanced manufacturing generated the highest gross state product per worker in Massachusetts at \$335,000 with the state average closer to \$170,000 per worker. In comparison, the NMEC industry stands out even among highly productive industries within advanced manufacturing with a GSP per worker at \$426,690 (Table 19).

While not as large of an employer, the pharmaceutical and medicine manufacturing industry leads the advanced manufacturing sector with the highest GSP per worker of \$696,004. Given Massachusetts' prominence as a hub for pharmaceutical innovation, the manufacturing of medications to treat illnesses and prevent diseases holds significant value. It is worth noting that this industry has also experienced substantial employment growth of 23.6% from 2019 to 2022.

The semiconductor industry, another noteworthy sector within advanced manufacturing, stands as the second-largest employer, accounting for 14% of the advanced manufacturing sector or 14,457 total jobs (Table 19). The industry has gained national priority with the signing of President Biden's CHIPS and Science Act ("CHIPS Act") on August 9, 2022, aimed at revitalizing domestic semiconductor manufacturing.

Semiconductors, which regulate electrical flow in modern electronics like cars, cell phones, and telecommunications equipment, are essential components for a thriving economy. The importance of semiconductors was demonstrated by the 2021 "chip shortage", which led to extended lead times, reaching an average of 15 weeks in January 2021, causing difficulties for consumers seeking products such as automobiles and gaming systems ([Bloomberg](https://www.bloomberg.com/graphics/2021-semiconductors-chips-shortage/) [bloomberg.com/graphics/2021-semiconductors-chips-shortage/](https://www.bloomberg.com/graphics/2021-semiconductors-chips-shortage/)). Bloomberg also estimated that U.S. automobile manufacturers lost approximately \$61 billion in sales due to semiconductor shortages in the same year. To address disruptions in the semiconductor supply chain, the "CHIPS Act" allocated \$50 billion out of the total \$280 billion to stimulate

domestic semiconductor production ([USAFacts](https://usafacts.org/articles/whats-in-the-recently-passed-chips-act/)) <https://usafacts.org/articles/whats-in-the-recently-passed-chips-act/>.

From a state perspective, in 2022, Massachusetts ranked seventh in the nation with 65 semiconductor establishments employing 14,458 workers. The industry's GSP per worker in Massachusetts stands at \$261,200, surpassing the state average.

Further, semiconductors rank as the third-highest value export in Massachusetts, with shipments worth \$2.7 billion ([SIA](https://semiconductors.org/wp-content/uploads/2022/05/Massachusetts-2022_1.pdf)) semiconductors.org/wp-content/uploads/2022/05/Massachusetts-2022_1.pdf. Although the employment size and growth of the semiconductor industry may not be remarkable, it is important to consider the industry's high productivity and potential future growth driven by national interests for the purpose of workforce development.

Table 20

Semiconductor occupations with the most 2022 employment

Occupation	Employment (2022)	% Growth (2019-2022)	Projected Annual Openings	Median Hourly Earnings	Typical Entry-Level Education
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	2,341	12.6	250	\$22.38	High School Degree
Industrial Engineers	1,004	-2.6	71	\$48.35	Bachelors
Semiconductor Processing Technicians	717	2.2	60	\$27.91	High School Degree
Inspectors, Testers, Sorters, Samplers, and Weighers	640	23.9	70	\$22.95	High School Degree
Industrial Engineering Technologists and Technicians	605	14.7	64	\$29.34	Associates
Miscellaneous Assemblers and Fabricators	557	6.1	62	\$17.70	High School Degree
Software Developers	525	-1.9	37	\$61.62	Bachelors
Electrical and Electronic Engineering Technologists and Technicians	410	-8.7	43	\$29.41	Associates
First-Line Supervisors of Production and Operating Workers	354	7.1	42	\$31.95	High School Degree
General and Operations Managers	350	21.5	33	\$60.58	Bachelors
Source: DER calculations using Lightcast data. Excludes occupations with fewer than 10 employed. Wage data sourced from 2021 statistics. Projected annual openings are the sum of projected labor force exits ("annual exits"), projected occupational transfers ("annual transfers"), and projected job growth ("annual growth"). These openings figures are based on an average over the occupational projection period from Q2-2022 to Q2-2024. Projected annual openings for occupations in the semiconductor industry were estimated based on the share of total state employment for that occupation in 2022. Table sorted by the occupation with the highest number of 2022 jobs.					

In the semiconductor industry, the share of employment for those typically requiring less than a bachelor's degree generally aligns with the overall advanced manufacturing sector. Notable semiconductor occupations in this regard include electrical and electronic

assemblers, semiconductor processing technicians, inspectors, and assemblers and fabricators (*Table 20*).

Within this subsector, there are 1,362 projected annual openings. Similar to the overall advanced manufacturing sector, electrical, electronic, and electromechanical assemblers exhibited the largest number of projected annual job openings.

Despite the high average annual earnings of \$158,924 in the semiconductor industry in 2022 (*Table 19*), surpassing the median annual wage of \$103,263 across all industries in Massachusetts, it is important to note that the pay distribution for positions typically requiring less than a bachelor's degrees in the semiconductor industry may not reach those levels. Instead, jobs where the typical education is less than a bachelor's degrees in the semiconductor industry have an average median hourly pay of \$25.25 or an annualized income of \$52,520, which meets the criteria of a livable wage according to [MIT's Living Wage Calculator](https://livingwage.mit.edu/states/25) <https://livingwage.mit.edu/states/25> for a single adult with no children in Massachusetts.

HEALTH CARE AND HUMAN SERVICES

The health care sector holds importance in Massachusetts as the largest employment sector in the state, employing 477,704 individuals and representing some of the top hospitals in the country. Unfortunately, it was also one of the sectors most directly affected by the pandemic. As the COVID-19 outbreak rapidly spread in early 2020, the health care infrastructure faced significant strain. In May 2020, the state documented the third-highest rate of reported COVID-19 cases and the fourth-highest number of deaths in the country (*Taube and Lipson*) [pw.hks.harvard.edu/post/ma-health-care-workforce](https://www.hks.harvard.edu/post/ma-health-care-workforce).

In the 2021 report "*COVID-19 and the Changing Massachusetts Health care Workforce*" by Taube and Lipson, it's noted that Massachusetts has been grappling with health care workforce shortages for over a decade due to challenges such as recruitment, training, and sluggish job creation. The pandemic added another layer of complexity, exerting further strain on the health care workforce. Although the health care sector is typically viewed as more resilient to economic downturns than industries like consumer goods, it faced substantial disruption in the early months of the pandemic. Specifically, during April and May 2020, health care professions saw a spike in unemployment claims. This was largely due to a decreased demand for elective procedures, outpatient care, and in-home services as individuals opted to self-isolate during those uncertain times.

Table 21

Health Care Occupations by Entry-Level Education

Typical Entry-Level Education	% Share Employment	# of Occupations	Avg. Median Hourly Wage ¹
Bachelors			
High School Degree	27.2	101	\$25.06
Post-secondary Non-Degree Award/Certificate	18.7	26	\$27.14
Advanced Degree	15.0	57	\$69.71

Associates	4.7	19	\$33.05
No Formal Educational Credential	4.0	28	\$16.66
Some College, No Degree	0.7	4	\$23.44
Source: DER calculations using Lightcast data. Includes standardized occupational classification (SOC) codes related to NAICS 621, 622, and 623. Excludes occupations with fewer than 10 employed. 2022 employment data.			
¹ 2021			

The health care sector offers a range of occupations, covering diverse roles from physical therapists to surgical assistants. More than half of the occupations (55.3%) comprise positions that typically require less than a bachelor's degree for entry (*Table 21*). Jobs commonly requiring a high school degree offer an average median hourly wage of \$25.06, compared to \$45.03 for those generally requiring a bachelor's degree.

Table 22

Top 10 Health care Occupations

Occupation	Employment (2022)	% Growth (2019-2022)	Projected Annual Openings	Median Hourly Earnings ¹	Typical Entry-Level Education
Registered Nurses	77,405	2.4	4,374	\$45.65	Bachelors
Home Health and Personal Care Aides	42,072	-12.3	8,390	\$17.45	High School Degree
Nursing Assistants	34,199	-11.5	5,489	\$17.97	Postsecondary Non-Degree Award/Certificate
Medical Secretaries and Administrative Assistants	21,664	2.6	2,579	\$22.60	High School Degree
Medical and Health Services Managers	13,543	10.3	1,338	\$60.26	Bachelors
Medical Assistants	13,173	-2.0	1,912	\$22.06	Postsecondary Non-Degree Award/Certificate
Licensed Practical and Licensed Vocational Nurses	13,164	-5.6	1,123	\$28.94	Postsecondary Non-Degree Award/Certificate
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	11,154	12.7	1,315	\$23.54	Bachelors
Clinical Laboratory Technologists and Technicians	9,868	5.0	622	\$28.67	Bachelors
Receptionists and Information Clerks	8,575	0.3	1,002	\$17.57	High School Degree
Source: DER calculations using Lightcast data. Includes standardized occupational classification (SOC) codes related to NAICS 621, 622, and 623. Excludes occupations with fewer than 10 employed. Wage data sourced from 2021 statistics. Projected annual openings are the sum of projected labor force exits ("annual exits"), projected occupational transfers ("annual transfers"), and projected job growth ("annual growth"). These openings figures are based on an average over the occupational projection period from Q2-2022 to Q2-2024. Projected annual openings for occupations in the health care sector were estimated based on the share of total state employment for that occupation in 2022. Table sorted by the occupation with the highest number of 2022 jobs.					
¹ 2021					

Observing various roles within health care from 2019 to 2022, home health and personal care aides experienced a decline in employment of -12.3%, while nursing assistants saw a decline of -11.5% (*Table 22*). These declines were affected by the reduced consumer demand for in-home care due to social distancing measures, transportation challenges, and a combination of low pay and high stress (*Taube and Lipson*) [pw.hks.harvard.edu/post/ma-health-care-workforce](https://www.hks.harvard.edu/post/ma-health-care-workforce).

Additionally, these factors may have contributed to increased annual openings based on labor force exits and occupational transfers. Home health and personal care aides saw the largest projected annual openings of 8,390 driven by 3,805 labor force exits and 3,287 occupational transfers (*Table 22*). The projected annual job openings (8,390) are roughly 20% of the 2022 employment (42,072) of home health and personal care aides, signifying sizable turnover trends in the occupation. Similarly, nursing assistants saw 5,489 in projected annual openings comprised of 2,355 labor exits, 3,046 occupational transfers, and minimal job growth.

Further, registered nurses—the largest health care occupation with 77,405 workers in 2022— also experienced changes in demand, with a spike in unemployment claims in the middle of 2020. This is primarily due to the varying demand for different types of registered nurses during the pandemic. Critical care nurses working in intensive care units were in extremely high demand, resulting in a surge in job postings. However, many ambulatory care nurses involved in “routine medical care” were either furloughed or laid off. The supply of new nurses was also disrupted, with education, training, and testing centers closed, leading to a months-long backlog of new nurses, which in turn affected employment growth in the occupation.

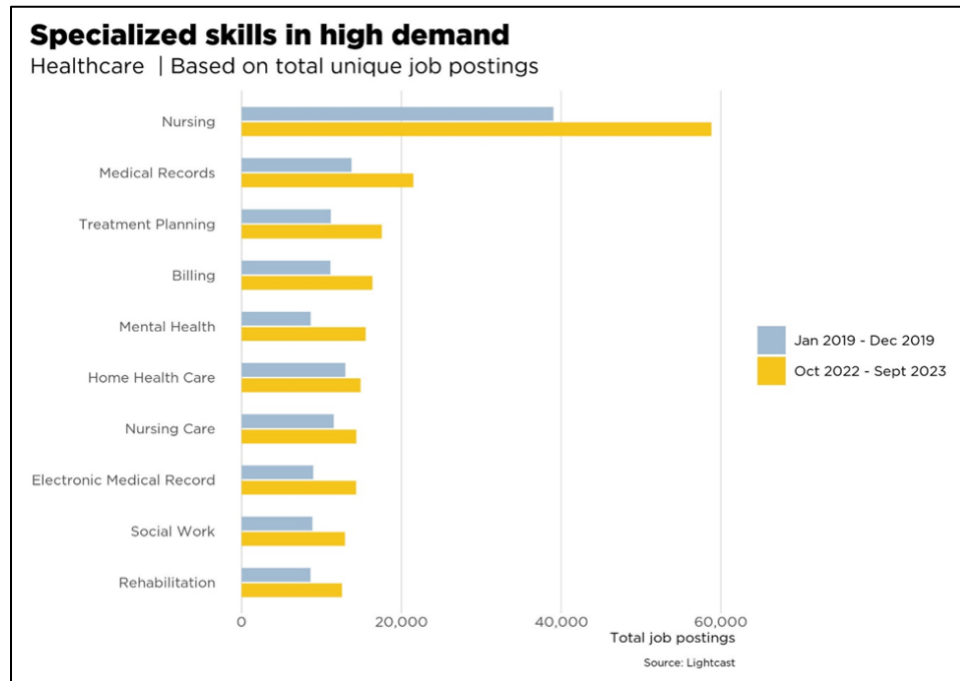
Moreover, the stress and workload of the pandemic may have accelerated attrition and retirement among registered nurses in Massachusetts. According to a 2023 U.S. research study by the National Council of State Boards of Nursing (NCSBN), 62% of respondents stated an increase in their workload during the pandemic and many reported feelings “emotionally drained”, “fatigued”, or “burned out” (*NCSBN*) ncsbn.org/news/ncsbn-research-projects-significant-nursing-workforce-shortages-and-crisis.

Among registered nurses, there were 4,374 projected annual openings, led by 2,343 labor force exits and 1,815 occupational transfers. In addition to the factors influencing the supply of nurses mentioned earlier, older age composition is correlated with increased occurrence of labor force exits. For instance, age is correlated with aspects such as retirement, disability, and heightened personal responsibilities. As of 2022, roughly 29% of nurses are aged over 55, compared to the average across all occupations, which stands at 25% (*Lightcast*).

Lastly, in terms of the workforce, health care positions often requiring a four-year degree encompassed roles such as registered nurses, medical and health services managers, and mental health counselors. In contrast, health care occupations typically requiring less than a

bachelor's degree included home health and personal care aides, nursing assistants, medical assistants, and licensed practical and licensed vocational nurses.

Figure 37



The projected demand for occupations in the health care sector align with many of the most in-demand skills today, suggesting a potential skills gap (*Figure 37*). Reflecting the tight labor market in health care, demand has risen across many skills groups since 2019, with a large increase in demand for nursing skills. Additionally, demand for administrative skills in health care like medical records, billing, electronic medical records has risen since 2019. Growing demand for skills related to mental health and social work align with projected demand for substance abuse, behavioral disorder, and mental health counselors.

Table 23

Top Health care Industries

Industry	Employment (2022)	% Growth (2019-2022)	GSP per Worker ¹	Avg. Earnings Per Job ²
General Medical and Surgical Hospitals	170,858	1.0	\$129,201	\$105,984
Offices of Physicians	57,960	0.4	\$171,162	\$146,811
Home Health Care Services	40,254	-11.4	\$65,917	\$59,108
Nursing Care Facilities (Skilled Nursing Facilities)	37,836	-22.0	\$76,715	\$69,366
Outpatient Care Centers	26,510	-1.3	\$150,463	\$89,872
Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	26,000	-3.0	\$73,089	\$65,643
Offices of Dentists	25,192	-0.3	\$109,333	\$83,519
Offices of Other Health Practitioners	22,043	5.6	\$131,341	\$65,855
Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	21,949	-4.8	\$58,876	\$53,318
Specialty (except Psychiatric and Substance Abuse) Hospitals	21,916	4.2	\$124,318	\$102,247
Source: DER calculations using Lightcast data. Includes sectors related to NAICS 621, 622, 623. Only includes industries greater than 10,000 jobs.				
¹ 2022				
² 2021				

Within industries in the health care sector (*Table 23*), the decline in employment within home health care services can be linked to the reduced demand for in-person services during the pandemic as well as strenuous work and low pay affecting labor supply for certain occupations as previously mentioned ([Taubé and Lipson](#)) pw.hks.harvard.edu/post/ma-health-care-workforce. Nursing care facilities were also hit hard by staffing turnover during the pandemic, with more than 50% of nurses leaving their roles after a year ([NIH](#)) ncbi.nlm.nih.gov/pmc/articles/PMC8208072/. This was due to several stressors, including the high infection and mortality rates within nursing homes, which were facilitated by denser enclosed areas with elderly populations. These shifts persisted into 2022, when occupancy rates at skilled nursing facilities reached just 75%, well below the 85% occupancy rate in 2019 (Kaiser Family Foundation).

LIFE SCIENCES

Massachusetts is a national leader in the life sciences sector, driven by pioneering research conducted in pharmaceuticals, biotechnology, and medical labs. The [2023 Massachusetts Life Sciences Employment Outlook Report](#) massbioed.org/labor-market-information/ by MassBioEd emphasizes the state's global prominence in this field. It highlights the strong employment growth and the significant presence of STEM workers, contributing to the local economy's prosperity.

Table 24

Life Sciences Occupations by Entry-Level Education

Typical Entry-Level Education	% Share Employment	# of Occupations	Avg. Median Hourly Wage
Bachelors	62.5	102	\$49.89
Advanced Degree	18.0	24	\$60.57
High School Degree	12.2	77	\$24.84
Associates	4.2	25	\$32.55
Postsecondary Non-Degree Award/Certificate	1.3	16	\$28.20
Some College, No Degree	1.0	3	\$25.33
No Formal Educational Credential	0.9	11	\$16.27
Source: DER calculations using Lightcast data. Excludes occupations with fewer than 10 employed. 2022 employment data. Wage data sourced from 2021 statistics.			
According to MassBio's 2022 Massachusetts Life Sciences Workforce Analysis methodology, occupations include industries where 50% or more of the employees work in the life sciences sector. The industries include medical laboratories, medicinal and botanical manufacturing, pharmaceutical preparation manufacturing, in-vitro diagnostic substance manufacturing, biological product manufacturing (excluding diagnostics), research/development in biotechnology (excluding nanobiotechnology), research/development in physical, engineering, and life sciences (excluding nanotechnology and biotechnology), as well as research/development in nanotechnology.			

In the life sciences sector, the majority (80.5%) of employment in positions typically required a bachelor's degree and higher, whereas 19.5% of employment was in occupations that normally require less than bachelor's degree (*Table 24*). Although life sciences employment often skews towards a 4-year education, there are still 132 different occupations that typically require less than a bachelor's degree, presenting opportunities for expansion within promising roles.

Table 25

Top 10 Life Sciences Occupations

Occupation	Employment (2022)	% Growth (2019-2022)	Projected Annual Openings	Median Hourly Earnings	Typical Entry-Level Education
Medical Scientists, Except Epidemiologists	7,869	-12.8	532	\$49.01	Advanced Degree
Biochemists and Biophysicists	6,736	70.7	673	\$63.40	Advanced Degree
Software Developers	4,678	77.0	329	\$61.62	Bachelors
General and Operations Managers	4,114	95.6	384	\$60.58	Bachelors
Biological Technicians	3,767	8.2	610	\$29.29	Bachelors
Natural Sciences Managers	2,803	27.8	172	\$112.71	Bachelors
Chemists	2,707	34.9	207	\$48.23	Bachelors
Clinical Laboratory Technologists and Technicians	2,169	14.3	137	\$28.67	Bachelors
Project Management Specialists	1,835	95.1	167	\$48.10	Bachelors
Microbiologists	1,807	102.1	200	\$62.20	Bachelors
Source: DER calculations using Lightcast data. Excludes occupations with fewer than 10 employed. Wage data sourced from 2021 statistics. Projected annual openings are the sum of projected labor force exits ("annual exits"), projected occupational transfers ("annual transfers"), and projected job growth ("annual growth").					

These openings figures are based on an average over the occupational projection period from Q2-2022 to Q2-2024. Projected annual openings for occupations in the life sciences sector were estimated based on the share of total state employment for that occupation in 2022. Table sorted by the occupation with the highest number of 2022 jobs.

According to MassBio's 2022 Massachusetts Life Sciences Workforce Analysis methodology, occupations include industries where 50% or more of the employees work in the life sciences sector. The industries include medical laboratories, medicinal and botanical manufacturing, pharmaceutical preparation manufacturing, in-vitro diagnostic substance manufacturing, biological product manufacturing (excluding diagnostics), research/development in biotechnology (excluding nanobiotechnology), research/development in physical, engineering, and life sciences (excluding nanotechnology and biotechnology), as well as research/development in nanotechnology.

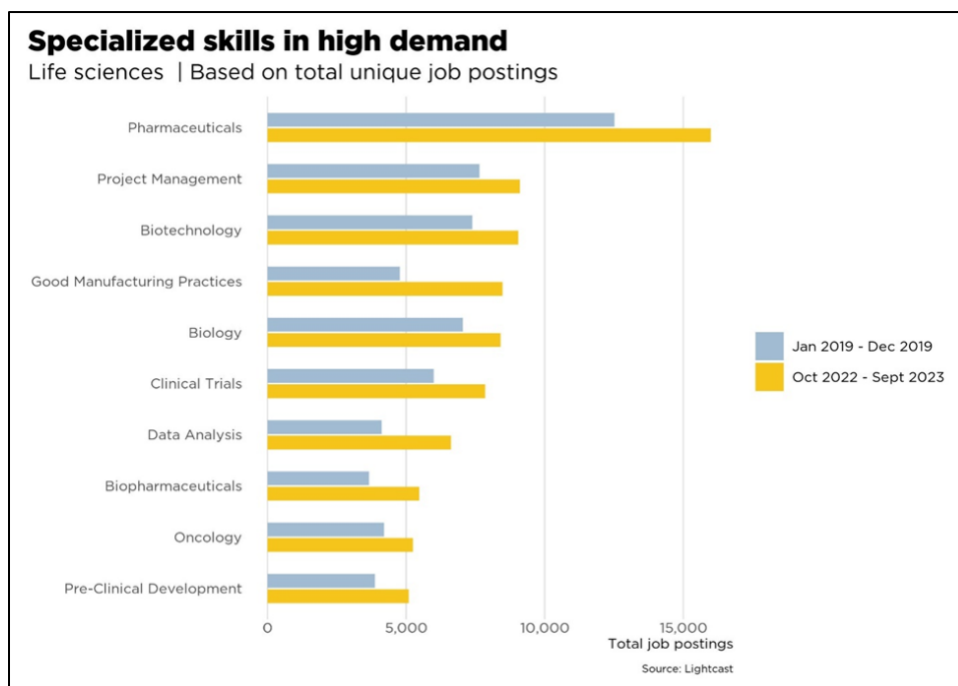
When considering the top occupations within the life sciences sector, it is primarily composed of highly skilled professionals who hold at least a bachelor's degree. Notable occupations in this field include medical scientists, biochemists and biophysicists, and software developers.

Furthermore, the life sciences sector has recently experienced strong employment growth, largely attributed to groundbreaking research in genomics, genetics, and pharmaceuticals. Specifically, during this period, biochemists and biophysicists, software developers, and general and operations managers experienced impressive growth rates of 70.7%, 77.0%, and 95.6%, respectively (*Table 25*).

In terms of job demand, projected annual openings for top occupations such as medical scientists (532), biochemists and biophysicists (673), and biological technicians (610) were relatively higher than other life sciences occupations. Among these specific occupations, approximately two-thirds of the openings were linked to occupational transfers.

The occupations projected to be in-demand in the future align with the skills that are in high demand today, pointing to potential skills gaps. In-demand skills like pharmaceuticals, biotechnology, biology, and oncology align with the scientific occupations that are projected to be in high demand (*Figure 38*). Additionally, skills related to management, regulations, and analysis like project management, Good Manufacturing Practices, and data analysis align with non-scientific occupations like operations managers, project management specialists, and software developers.

Figure 38



While providing fewer employment opportunities for those without a bachelor's degree compared to other sectors, the roles that typically require less than a bachelor's degree span a wide range of occupations. These positions include packaging and filling machine operators and tenders, inspectors, testers, sorters, samplers, and weighers, chemical technicians, and customer service representatives. (*Table 26*). Life sciences positions normally requiring at least a high school degree offer an average median hourly wage of \$24.84, and \$32.55 for those with an associate degree (*Table 10*). Furthermore, projected annual openings were the highest for occupations such as phlebotomists (132), packaging and filling operators (123), and executive secretaries (115).

Table 26

Top 10 Life Sciences Occupations Without a bachelor's degree

Occupation	Employment (2022)	% Growth (2019-2022)	Projected Annual Openings	Median Hourly Earnings	Typical Entry-Level Education
Executive Secretaries and Executive Administrative Assistants	1,044	-5.0	115	\$30.27	High School Degree
Packaging and Filling Machine Operators and Tenders	903	58.0	123	\$16.11	High School Degree
Inspectors, Testers, Sorters, Samplers, and Weighers	817	59.9	89	\$22.95	High School Degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	763	-4.5	80	\$23.00	High School Degree
Phlebotomists	686	-5.7	132	\$21.55	Postsecondary Non-Degree Award/Certificate
Office Clerks, General	674	-2.3	91	\$20.88	High School Degree
Chemical Technicians	578	5.3	46	\$28.27	Associates
Customer Service Representatives	543	12.3	67	\$21.64	High School Degree
First-Line Supervisors of Production and Operating Workers	533	42.9	63	\$31.95	High School Degree
Bookkeeping, Accounting, and Auditing Clerks	524	36.2	69	\$23.49	Some College, No Degree
Source: DER calculations using Lightcast data. Excludes occupations with fewer than 10 employed. Wage data sourced from 2021 statistics. Wage data sourced from 2021 statistics. Projected annual openings are the sum of projected labor force exits ("annual exits"), projected occupational transfers ("annual transfers"), and projected job growth ("annual growth"). These openings figures are based on an average over the occupational projection period from Q2-2022 to Q2-2024. Projected annual openings for occupations in the life sciences sector were estimated based on the share of total state employment for that occupation in 2022. Table sorted by the occupation with the highest number of 2022 jobs.					
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Progression in the life sciences industry could potentially be more difficult for those without a college degree. Given that many jobs in the sector require a bachelor's degree in science or engineering, or even a higher level of education, individuals who venture into the life sciences field without such qualifications might encounter hurdles in their career advancement.

CLEAN ENERGY

The Massachusetts focus on clean energy has positioned it as a national leader. In 2022, Massachusetts accounted for 4% of the national clean energy workforce, double its share of the total national workforce. In 2022, the Massachusetts Secretary of Energy and Environmental Affairs outlined climate targets in the [Massachusetts Clean Energy and Climate Plan for 2025 and 2030](https://www.mass.gov/info-details/massachusetts-clean-energy-and-climate-plan-for-2025-and-2030) (“2025/2030 CECP”) [mass.gov/info-details/massachusetts-clean-energy-and-climate-plan-for-2025-and-2030](https://www.mass.gov/info-details/massachusetts-clean-energy-and-climate-plan-for-2025-and-2030). The plan aims to cut greenhouse gas emissions by 50% (relative to 1990 levels) by 2030 and reach net zero emissions by 2050. Recognizing the significant workforce needed to drive growth in energy efficiency, solar, and wind sectors to meet these objectives, MassCEC published the [Powering the Future: A Massachusetts Clean Energy Workforce Needs Assessment](https://masscec.com/resources/massachusetts-clean-energy-workforce-needs-assessment) masscec.com/resources/massachusetts-clean-energy-workforce-needs-assessment in July 2023. This assessment delves into expected labor demands and offers insights on workforce strategies essential for realizing these decarbonization goals.

It is estimated that to achieve the 2030 GHG objectives, Massachusetts will need to increase its clean energy workforce by 29,700 full-time equivalent (FTE) workers or 38,100 workers that devote either partial or full time to clean energy tasks. For the realization of net zero emissions by 2050, 77,000 new FTE workers will be necessary.

While clean energy jobs span 144 distinct occupations, analysis suggests that 36% of the anticipated job growth will be focused on just five specific roles. A substantial 65% of this growth is expected within 20 occupations. The clean energy roles projected to experience the highest growth are electricians (+69%), construction laborers (+33%), general and operations managers (+31%), first-line supervisors of construction trades and extraction workers (+35%), and insulation workers (+25%) (*Table 27*). Notably, among the top ten growth roles, eight don't demand a bachelor's degree.

Further, the MassCEC report targeted 32 “priority” clean energy occupations that are critical in streamlining long-term decarbonization efforts. Some of these select occupations were highlighted due to their high growth, lower educational barriers with favorable employee pay/benefits, and opportunity to upskill. *Table 11* below presents the top 10 priority occupations in terms of the additional clean energy jobs needed by 2030.

Table 27

Top 10 Clean Energy Priority Occupations

Occupation	Additional Clean Energy Jobs (2022-2030) ¹	% Growth of Clean Energy Jobs (2022-2030)
Electricians	4,444	68.7
Construction Laborers	2,288	32.9
General and Operations Managers	1,579	31.1
Insulation Workers	965	25.3
Line Installers and Repairers	722	97.6
Heating, Ventilation, Air Conditioning, and Refrigeration Mechanics and Installers	650	16.9
Construction and Building Inspectors	532	25.4
Software and Web Developers, Programmers, and Testers	455	13.1
Customer Service Representatives	404	26.8
Carpenters	398	28.5
Source: Based on the <i>Massachusetts Clean Energy Center Workforce Needs Assessment July 2023, Table 3: Workforce Priority Occupations by Occupational Category</i> .		
¹ Additional clean energy jobs needed by 2030 to achieve a 50% reduction in greenhouse gas emissions, relative to 1990 levels, by 2030 based on the <i>2025/2030 CECF</i> .		

By 2030, electricians will be the occupation in highest demand and the one of the most challenging to train, with a requirement for 4,400 new clean energy electricians (Table 27). Given that becoming a licensed electrician requires 4-5 years of apprenticeship and considering the constraint that certified electricians can mentor only one apprentice concurrently, building a talent pipeline will take a focused effort. Additionally, as the majority of electricians are white males, it is imperative to devise proactive strategies to diversify the workforce and engage underrepresented communities, thereby enriching the talent pool of clean energy electricians.

Heating, Ventilation, Air Conditioning, and Refrigeration Mechanics and Installers (HVAC-R Mechanics/Installers) constitute another high-demand occupation that is similarly difficult to fill. Typically, this role demands four years of vocational/technical education, approximately an additional year of education/training, and formal certifications. By 2030, 650 new HVAC-R Mechanics/Installers will be needed. Both electricians and HVAC-R workers are identified in the report as being a “severe risk” in bottlenecking the achievement of GHG goals by 2030.

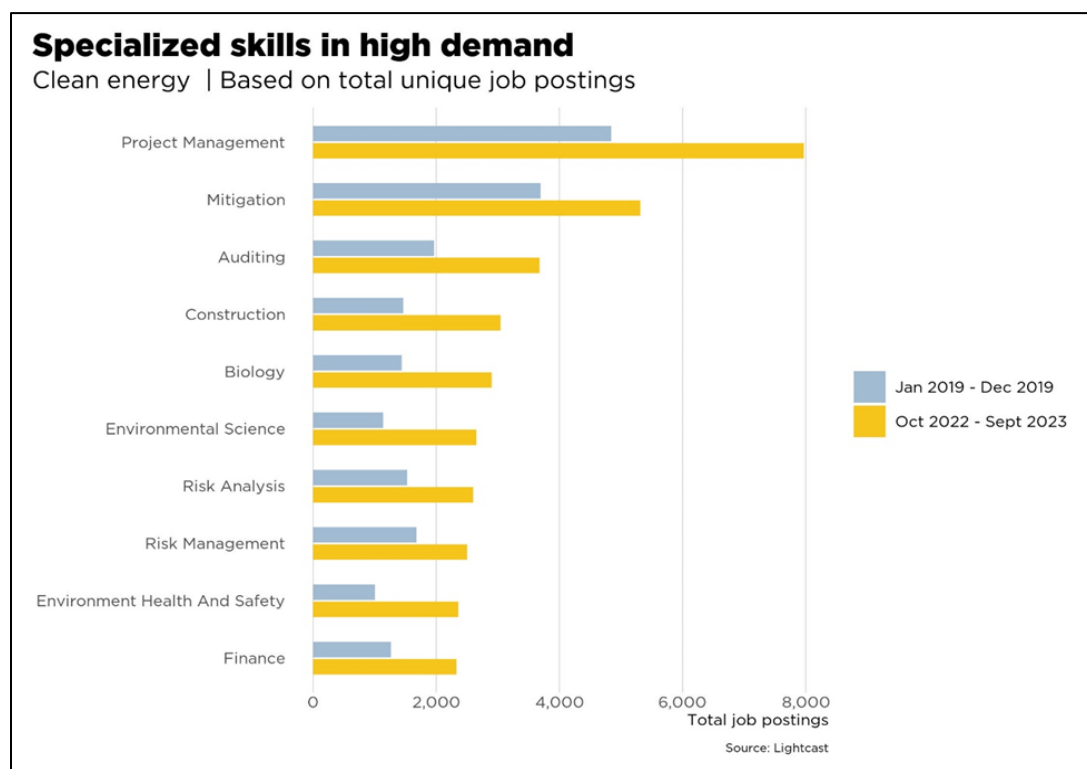
Additionally, electric power-line installers and repairers, critical for building the electricity infrastructure of the green economy, also requires extensive formal training such as an apprenticeship lasting several years. Subsequently, 722 electrical power-line workers are needed by 2030 to achieve long-term GHG targets.

From an industry perspective, the energy efficiency sector is expected to account for 60% of all new growth in clean energy workers by 2030, adding 17,900 jobs. These jobs focus on energy efficiency design in new home construction and improvements existing homes. Tasks may include installing energy-efficient appliances/fixtures, enhancing insulation, and

introducing advanced heating and cooling systems. Within this sector, the roles of construction laborer, insulation worker, and general operations manager will be pivotal for growth. Other notable growth sectors include renewable energy (+7,800) and alternative transportation (+3,800). Training electricians to set up and maintain offshore wind turbines, solar panels, and electric vehicle charging stations will be essential in these sectors.

Among these sectors, notable subsectors such as offshore wind, transmission and distribution, utility scale solar, and electric motor vehicles are anticipated to at least double by 2030. Offshore wind, the development of wind farms in bodies of water, is expected to witness the fastest growth rate (724%) among subsectors, translating to roughly 2,200 jobs by 2030.

Figure 39



While many of the in-demand jobs in the clean energy sector require physical skills or technical skills related to working with specialized equipment, many of the most in-demand skills in the sector relate to the process of developing, implementing, and maintaining clean energy projects (*Figure 39*). These include skills such as project management, auditing risk analysis, and finance. These skills are already in high demand and could pose potential skills shortages in the future.

CONCLUSION

The COVID-19 pandemic unleashed an economic crisis in Massachusetts that continues to reverberate through the labor market. At first glance, top-level statistics indicate a robust

rebound - unemployment has plunged to record lows as jobs have rebounded to pre-pandemic counts. However, digging deeper reveals a nuanced narrative of an uneven, partial recovery.

A nuanced regional analysis reveals divergent paces of recovery across the state. While Greater Boston benefited from its mix of resilient sectors, other regions continue to struggle. Local conditions, not just industry composition, are driving differences. The slow rebound of health care outside of Boston is particularly concerning given its importance across the Commonwealth.

A closer examination of key industries likewise showcases bifurcated experiences. Sectors like tech and life sciences have flourished, leveraging remote work, and expanding research. But hospitality and retail face ongoing worker shortages, struggling to bounce back from closures and reduced tourism.

Most alarmingly, despite the recovery in jobs, the labor force has contracted significantly since 2019. There are now over 100,000 fewer people employed or looking for work, even as job openings have surged to record levels. For every unemployed person, there are 2.5 jobs available, far exceeding pre-pandemic ratios. This points to an extremely tight labor market that poses challenges for employers and limits economic potential.

While lower-wage jobs in sectors impacted by the pandemic show substantial openings, demand is also rising for high-skill occupations. This underscores the need for both upskilling efforts and promoting degree attainment. At the same time, demand persists for middle-skill roles.

Analysis of demographic groups reveals inequities exacerbated by the pandemic. While Black workers have seen employment gains, Hispanic workers continue to face higher unemployment. Immigrants are playing an increasingly vital economic role, and a recent wave of migration presents new challenges and opportunities. Declines in youth and older worker engagement raise concerns about career lifecycle supports.

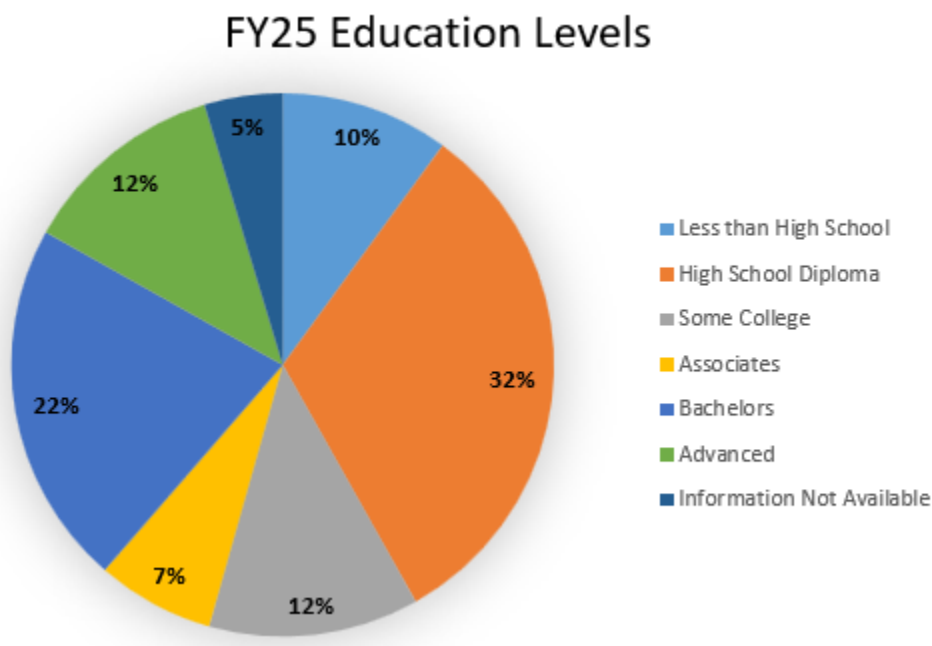
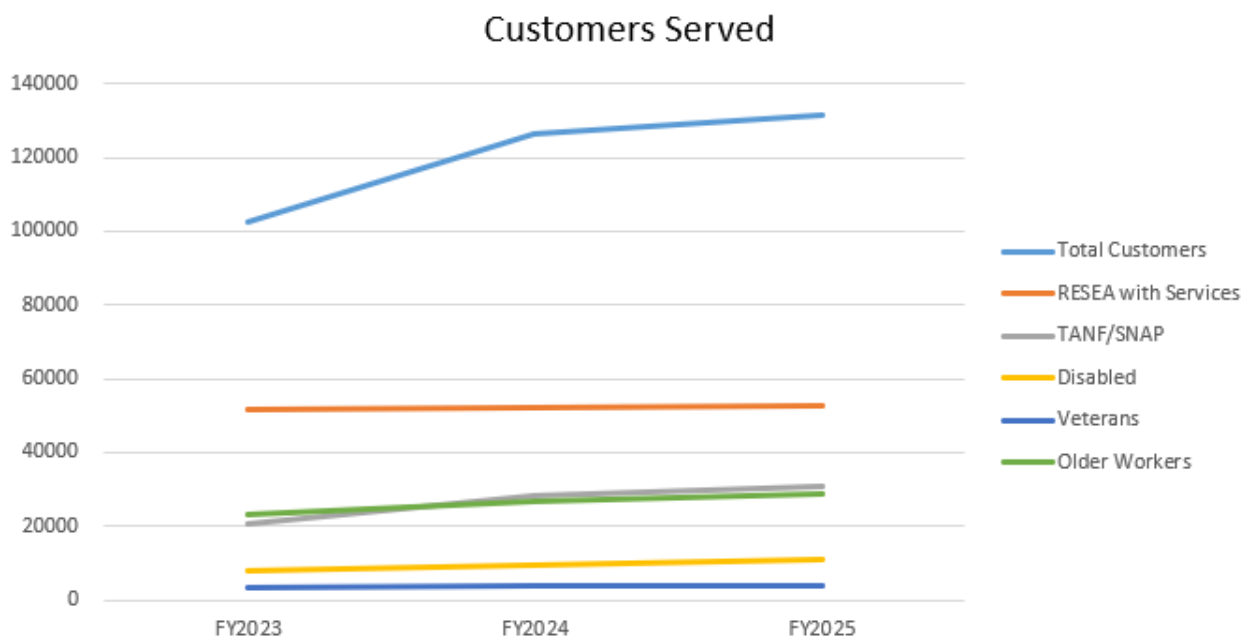
In closing, while Massachusetts has shown remarkable resilience, recovery remains incomplete. The tight labor market and declining labor force pose threats to future economic development. But solutions must also recognize diverse regional and demographic experiences. Targeted efforts to increase skills training, boost labor force participation, create career pathways, and promote workforce equity can help realize the full promise of the Commonwealth's workforce and cement an equitable recovery.

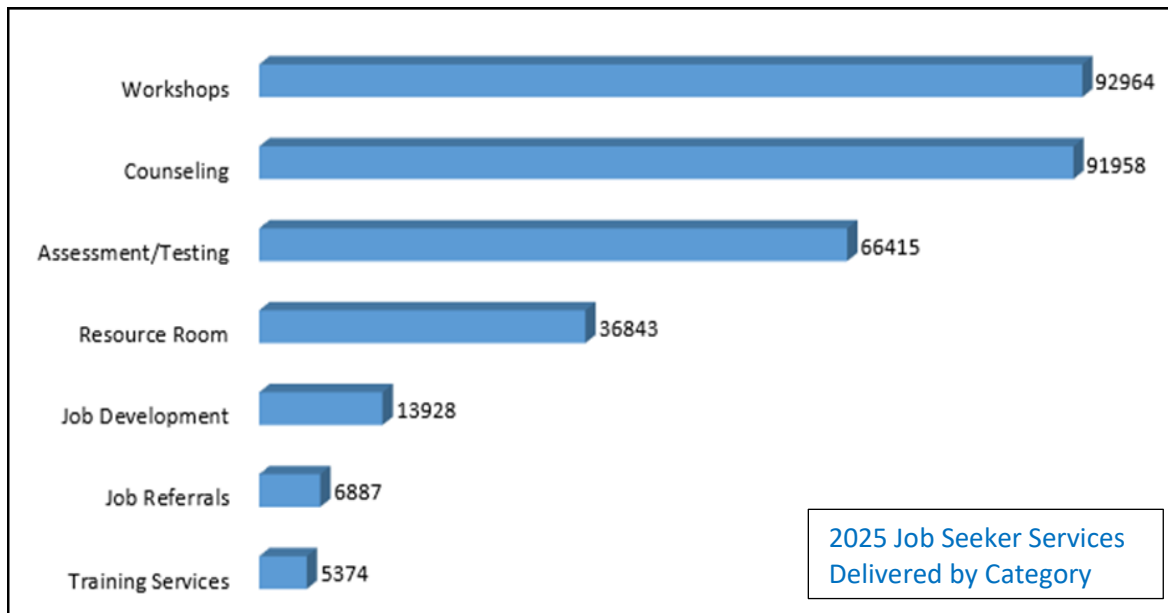
B. The State's Workforce Development Activities

TWO YEAR UPDATE

MassHire continues to serve as a critical resource for jobseekers and business in Massachusetts, serving the Commonwealth across 23 comprehensive and 2 affiliated, and 4

youth career centers across the state. Below is data updated to reflect services provided across the MassHire system in 2025.





MassHire continues to provide employer services (supported by both state and federal resources) to the business community. MassHire Career Centers provide a full suite of no-cost services to help employers hire efficiently and build a strong, reliable workforce. Through a coordinated statewide network, employers gain access to recruitment support, hiring events, training resources, labor market insights, and guidance on state and federal workforce programs. This approach reflects a broader national emphasis on aligning workforce systems with employer needs by ensuring businesses can easily access the talent and services required to stay competitive. Business Service Representatives (BSRs) support employers across all industries, including agriculture, by offering expertise in hiring strategies, training programs, tax incentives, and labor market trends. Outreach Specialists focus specifically on the needs of job seekers who may face barriers to employment. They help individuals navigate the workforce system, access training and support services, and

prepare for employment opportunities. For employers, Outreach Specialists assist with recruitment for seasonal, short term, and hard-to-fill roles, connect businesses to workforce funding, and provide guidance on documentation and compliance requirements. Their work strengthens the connection between job seekers and employers, ensuring that the system adapts to evolving labor market needs.

Together, BSRs and Outreach Specialists ensure employers receive personalized, hands-on support tailored to their workforce needs. They strengthen communication between businesses and the MassHire system, promote available services and resources, and help employers build a dependable pipeline of workers—advancing the broader goal of a workforce system that is aligned, demand driven, and responsive to employers across the Commonwealth.

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(2) The Workplace, Development, Education and Training Activities Analysis
The *Unified or Combined State Plan* must include an **analysis of the workforce development activities**, including education and training in the State, to address the education and skill needs of the workforce, as identified in (a)(1)(B)(iii) above, and the employment needs of employers, as identified in (a)(1)(A)(iii) above. This must include an analysis of –

(A) Provide an analysis of the State’s workforce development activities, including education and training activities of the core programs, *Combined State Plan* partner programs included in this plan, and mandatory and required and optional One-Stop delivery system partners..¹

The Commonwealth continues to build on initiatives to better align the broadly defined workforce system with the needs of business as well as focus on expanding the impact on job outcomes for individuals with barriers to employment. The MassHire brand unifies the entire Massachusetts Workforce System under a single name and a shared mission.

The MassHire Workforce System inclusive of 16 MassHire Workforce Boards, 29 MassHire Career Centers, MassHire Department of Career Services, and the state MassHire State Workforce Board promote and celebrate the vision, mission, and values as described in the MassHire Brand Charter. The MassHire brand signals to businesses and jobseeker customers the Commonwealth’s commitment to increasing meaningful career opportunities for individuals and expanding the talent pool for businesses that seek a skilled labor force.

The MassHire Charter is found in *Attachment A*.

Overview and analysis of the workforce development activities for target populations:

- All business and jobseekers including Veterans (Workforce Boards and MassHire Career Centers)

- Individuals receiving TAFDC (Department of Transitional Assistance)
- Individuals receiving SNAP (Department of Transitional Assistance)
- Adult Education and Basic Skills (Department of Elementary and Secondary Education)
- Multi-Agency Career-Readiness Initiative
- Individuals with Disabilities (Vocational Rehabilitation through Massachusetts Rehabilitation Commission and the Massachusetts Commission for the Blind) and Community Based Organizations (CBO) funded by the Department of Mental Health and Department of Developmental Disabilities
- Youth (WIOA Youth and YouthWorks)
- Talent Pipeline Initiatives for Business (Workforce Competitiveness Trust Fund and Workforce Training Fund)

Resources and Services: All Job Seekers and Businesses

MassHire Workforce Boards and MassHire Career Centers

A large portion of the workforce activities occurs through the MassHire Career Centers. As of 2023, there are 23 comprehensive and 2 affiliated centers located throughout the Commonwealth. In addition, there are 4 centers dedicated to serving the Youth population. These centers comprise the backbone of the state's delivery system for employment and training services for job seekers, businesses, and workers.

Figure 40: MassHire Career Center Map



The MassHire Career Center (MCC) system categorizes its services to job seekers and workers across a continuum of basic, individualized, and follow up services. Self-service activities and group services such as workshops are also available. Training may be provided through the Individual Training Account (ITA) system, on-the-job training, apprenticeship, and under specific circumstances, customized or class-sized training may be appropriate. MCCs serve as the point of access to a system of training providers with programs and services tailored to individual needs and career objectives. Services are provided in accordance with individual career plans, which are collaboratively developed by

employment counselors and jobseekers, in accordance with local planning and implementation decisions.

Each comprehensive MassHire Career Center (MCC) offers an extensive array of jobseeker services that include:

- Universal access to basic services including:
 - Labor Market Information
 - Information on Programs/Services
 - Program Referrals
 - Self-Service Activities
- Determination of eligibility to receive assistance under WIOA;
- Outreach and intake, including career center seminars that provide orientation to the information and other services available through the MassHire service delivery system;
- Initial assessment of skills, aptitudes, interests and abilities, and supportive service needs;
- Career counseling, job search and placement assistance;
- Provision of employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, such as job vacancy listings in such labor market areas, information on job skills necessary to obtain the jobs available, and information relating to local occupations in demand and the earnings and skill requirements for those occupations;
- Provision of performance information and program cost information on eligible providers of training services;
- Provision of information regarding local area performance as relates to local performance measures and any additional performance information, as available;
- Provision of information relating to the availability of supportive services, including but not limited to childcare and transportation.

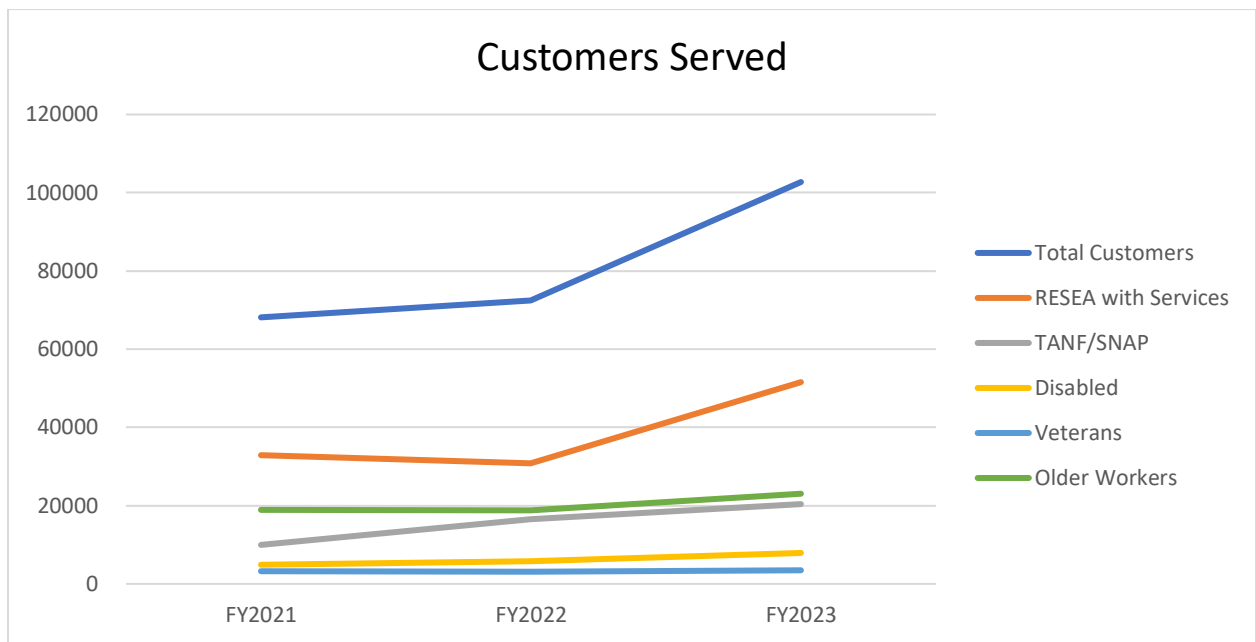
In fiscal year 2023, the Massachusetts workforce system served 102,734 jobseekers, 19% of whom were determined to have or self-reported a significant barrier to reemployment. Individuals connect to the system through the Unemployment Insurance System's Reemployment Services Eligibility Assessment (RESEA), referrals from partners (TANF, SNAP, Vocational Rehabilitation, etc.) and on a walk-in basis.

MassHire Career Centers offer a full menu of comprehensive services for businesses that include:

- Active employer outreach and solicitation of job openings
- Timely screening and referral of competitive applicants

- Provision of information regarding the full array of MCC services
- Customer assistance with online listing of job orders and access to the state's talent bank
- Basic labor market information and listings of education and training programs and resources
- Referral services for employers to sources of funding for worker training
- Community service organizations and tax credit programs
- Assistance with significant employer downsizing or layoffs, including layoff aversion strategies
- Job fairs and recruitment events are held either on site at the MassHire Career Centers or at other venues that will attract an increased number of jobseekers
- Coordination with economic development as well as various programs that can assist business
- Information sessions for businesses on tax incentive programs and the Workforce Training Fund programs—training for incumbent workers and layoff aversion programs and services

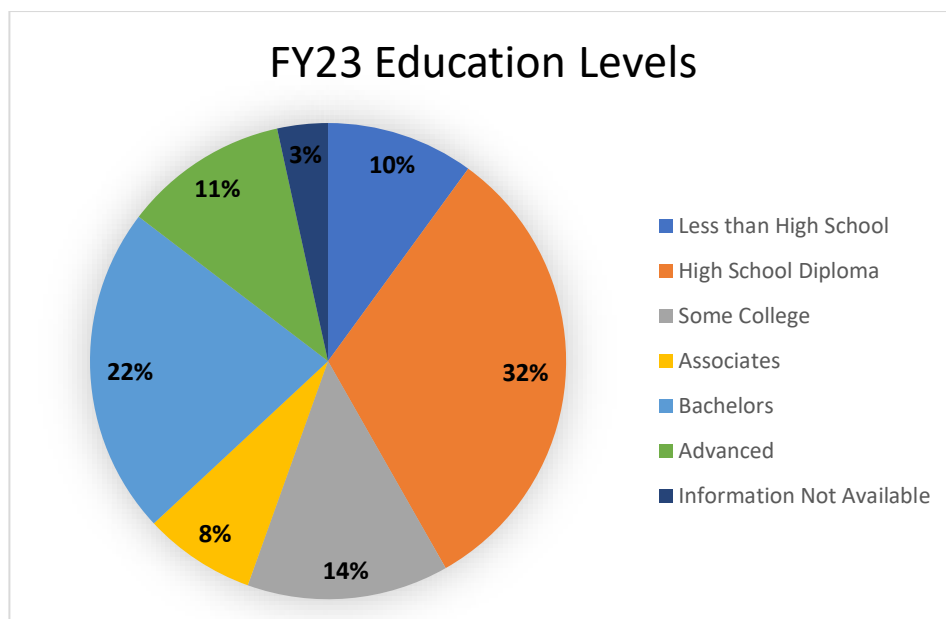
Figure 41: MassHire Career Center Customers Served



Source: *Massachusetts One-Stop Employment System data*

Overall, MassHire Career Center customers reflect the data trend that individuals with less education experienced higher levels of unemployment and were more likely to be in need of services. In FY23, the following breakdown by education demonstrates that 42% of the customer base only had a high school diploma or less.

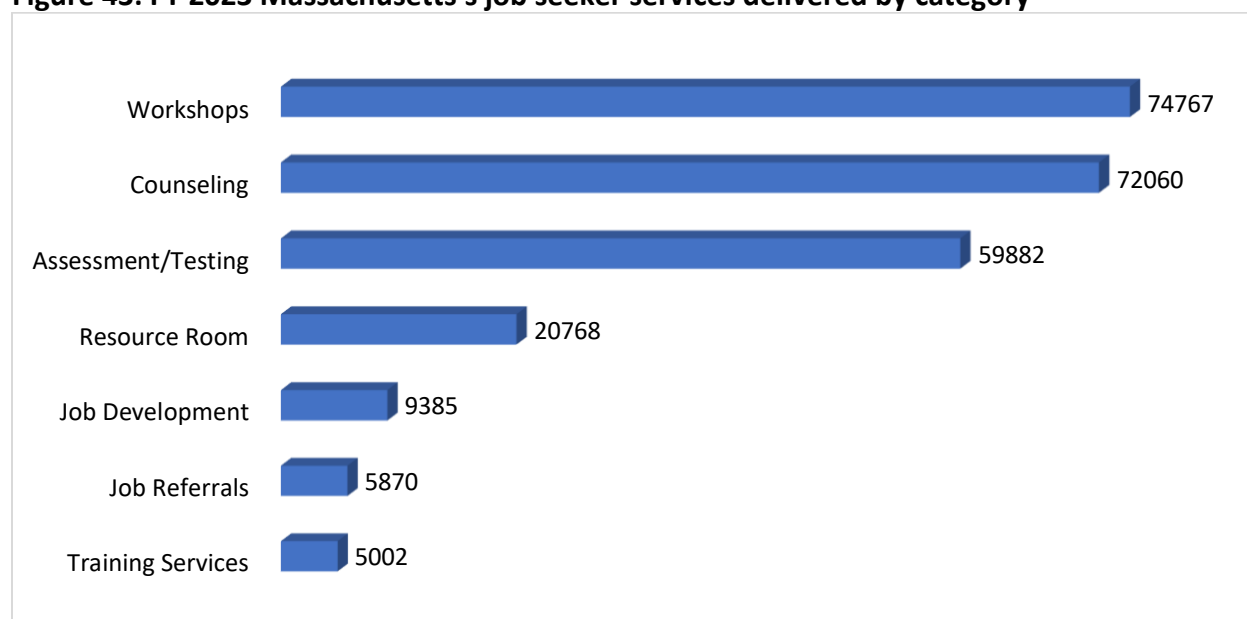
Figure 42: FY23 Education Levels of MassHire Career Center Customers



Source: *Massachusetts One-Stop Employment System data*

A summary of the type of activity conducted at MassHire Career Centers can be seen in the chart below. Individuals are counted across multiple service types.

Figure 43: FY 2023 Massachusetts's job seeker services delivered by category



Source: *Massachusetts One-Stop Employment System data*

MassHire Career Center Training Resources

In FY23, the top ten WIOA funded training was in the following occupational categories.

Figure 44: FY2023 WIOA Training Enrollments by Occupational Categories



Source: *Massachusetts One-Stop Employment System data*

With close to half of MCC customers having a high school diploma or less, there is a prime need to focus on workforce services that will enable individuals in this category to enter the labor force. In FY 2023 less than 10% of training enrollments were in computer/mathematical-related programs. As noted previously, with the high demand for IT-related occupations, workforce services, training in particular, need to align with this talent pipeline and grow the number of individuals able to pursue technical occupations.

Services to Business

MassHire BizWorks markets business services (funded by both state and federal resources) to the business community and cross-trains staff working with business on different resources. Over the years, thousands of companies benefited from MassHire BizWorks services. The goal of MassHire BizWorks is to align the resources and services offered to Massachusetts businesses through state workforce development, economic development, and education organizations in order to help Massachusetts businesses grow and thrive. To achieve this goal, MassHire BizWorks builds relationships across agencies and with businesses; develops standard staff business service knowledge and competencies across relevant state agencies; and coordinates and links resources and information.

As a result of these efforts more Massachusetts businesses are aware of, and utilize, relevant state resources and incentives; there is “no wrong door” for businesses to connect with business support; and services and outcomes continue to be captured to demonstrate the impact of these efforts. All companies, including those that are expanding, downsizing, or looking to maintain can benefit from services offered by MassHire BizWorks.

Services to address the workforce development and expansion needs of businesses and employers in Massachusetts are organized into five main categories:

1. Recruiting and hiring;

2. Training, consultation, and workplace safety;
3. Layoff aversion and management;
4. Business development and partnerships; and
5. Business compliance

The MassHire BizWorks Guide includes a list of external resources (non-state affiliated), important websites, and resource contacts (names, phone numbers, email, etc.) for programs listed in the guide for easy referencing. This guide is available as a hardcopy handbook produced by the Executive Office of Labor and Workforce Development's MassHire Department of Career Services (MDCS), as well as a downloadable document on the MassHire BizWorks website at mass.gov/masshire-bizworks.

Resources and Services: Individuals receiving TAFDC and SNAP

TWO YEAR UPDATE

DTA continues to administer the Pathways to Work program and provide employment- and training- supports to TANF and SNAP recipients that promote meaningful career pathways that advance economic mobility.

DTA has continued to see an increase in enrollments for the Competitive Integrated Employment Services (CIES) program as more families became comfortable with returning to the workforce. Over the last two years, CIES providers have made shifts in their modes of service delivery to increase access and supports for families transitioning back into employment post-pandemic and have been able to connect families to jobs with living wages and help them retain their employment.

The focus on flexible service delivery models and individual supports better positioned providers to support the immediate, unique needs of participants in the areas of family stability and well-being, while focusing on remote education and training that tied to participants' employment goals. DTA continues to support the delivery of CIES services in a virtual or hybrid model to increase program accessibility while keeping participants engaged as they prepare to return to work or obtain employment post-pandemic.

Over the last year, DTA has seen a significant increase in clients engaging and participating in the program, training completions and employment retention. Clients who can participate are experiencing wage growth and obtaining jobs connected to emerging career pathways. DTA is also continuing to make improvements in data collection to improve analysis of enrollments and outcomes related to virtual services, hourly wage growth, and job retention at 30, 90, and 180 days.

DTA also continues to improve services across the Commonwealth, including updates to the Young Parents Program through active engagement and sustained community involvement, an emphasis on education, labor market driven job services through its SNAP path-to-work

program, and working to ensure access to High School Equivalency Testing (HiSET) or General Educational Diplomas testing.

Department of Transitional Assistance (DTA) activities: The Pathways to Work program, administered by the Department of Transitional Assistance, provides employment and training supports to TANF and SNAP recipients that promote meaningful career pathways that advance economic mobility. Each year, the Legislature allocates funding for employment services for families receiving TAFDC through the Employment Services Program (ESP) line item. The primary goal of TAFDC Pathways to Work is to assist TAFDC clients obtain and maintain employment with career growth potential, resolve barriers to employment and provide families who receive TAFDC with education, training, and employment supports. Full Engagement Workers (FEWs) assist families receiving TAFDC to achieve these outcomes through referral to and collaborative goal setting with programs appropriate for individual skill level and goals. In addition to employment education and training, learning disability assessments and high school equivalency testing support are also funded through the ESP line item.

DTA's Employment Services Program includes the following:

- Competitive Integrated Employment Services Program (CIES);
- Employment Supports Services Program at the Office for Refugees and Immigrants (ORI);
- DTA Works Program;
- Young Parents Program (YPP);
- Empowering to Employ;
- Secure Jobs Program; and
- Work Participant Program (WPP).

Competitive Integrated Employment Services (CIES) Program

The Competitive Integrated Employment Services (CIES) program provides training, education, and job readiness services to TAFDC families interested in obtaining employment. The primary focus is to assist clients in seeking and securing employment in jobs connected to a career pathway with the supports necessary to stay employed and achieve career growth. This program implements a whole family approach to providing these services. This approach is facilitated by assessing and addressing the needs of each family across their life domains of family stability, well-being, financial management, education and training, and employment and career.

Through the CIES program, DTA hopes to affect change for families receiving TANF by:

- Empowering participants to pursue a path to economic mobility through education, training, and job readiness;
- Actively engaging participants to develop the skills necessary to achieve economic stability in a fulfilling career path; and

- Providing participants with hope and aspiration to break the cycle of poverty and achieve personal and economic growth as they pursue their goals.

The CIES program provides a comprehensive array of job search, training, and education services focused on successful employment placement, career growth, and retention. Clients may also participate in industry-validated occupational/vocational training. The CIES program recognizes that job readiness involves more than just education and work history but includes addressing issues that can significantly impact an individual's ability to maintain employment such as health, housing stability, and family life. Through workforce development, contextual learning, and breaking down barriers, DTA partners with CIES providers to empower participants to build family stability while obtaining and sustaining employment.

CIES providers actively engage and partner with participants to set family goals and develop individualized employment plans incorporating four components: Assessment and Goal setting, Job-targeted Education and Skills Training, and Job Retention at 30, 90, and 180 days. Job Retention Services include goal setting, continued skill development, and coordinated case management. CIES outcomes are based on these four components which are all connected directly to employment. To obtain these outcomes, CIES providers support families as they pass through recognized milestones. Providers provide post-employment supports to clients for up to one year. To ensure providers have the resources to provide post-employment supports, outcome payments are made to service providers when clients retain employment and/or experience wage growth.

DTA has continued to see an increase in enrollments for the CIES program as more families became comfortable with returning to the workforce. Over the last two years, CIES providers have made shifts in their modes of service delivery to increase access and supports for families transitioning back into employment post-pandemic and have been able to connect families to jobs with living wages and help them retain their employment.

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Over the last year, DTA has seen a significant increase in clients engaging and participating in the program, training completions and employment retention. Clients who can participate are experiencing wage growth and obtaining jobs connected to emerging career pathways in the current economy. DTA is also continuing to make improvements in data collection to improve analysis of enrollments and outcomes related to virtual services, hourly wage growth, and job retention at 30, 90, and 180 days.

Employment Supports Services Program at the Massachusetts Office for Refugees and Immigrants (ORI)

The Employment Supports Services Program, administered by the Massachusetts Office for Refugees and Immigrants (ORI) offers unique language, cultural, and employment placement skills to TAFDC recipients who are refugees and immigrants, and those whose primary language is not English. Services are provided in the client's primary language as they work to build their English language skills. Youth participants can enroll in this program after completing their high school equivalency including HiSET/GED or DTA's YPP.

Through ORI services, families can overcome cultural and linguistic barriers which may hinder them from obtaining and retaining employment. ORI's employment services include comprehensive assessment of a family's needs, employment readiness, access to vocational skills trainings, financial literacy, job placement, and retention. Currently, ORI provides these services to eligible clients in the Boston, Brockton, Chelsea, Framingham, Holyoke, Lowell, Malden, North Shore, Quincy, Worcester, and Springfield DTA catchment areas.

DTA Works

The DTA Works Internship Program is a work-ready program funded for TAFDC recipients. DTA Works provides TAFDC recipients with the opportunity to acquire or develop skills necessary to re-enter the workforce. Interns are placed at a variety of locations including DTA offices, state agencies and non-profit community-based organizations where they receive on-the-job training and mentor support. Interns also work with their mentor and program coordinators to identify barriers that may be interfering with their economic mobility. Once identified, the intern and coordinator create specific goals to overcome those barriers and support the intern on their path to economic mobility.

Young Parents Program

The Young Parents Program is a year-round, full-time program that focuses on education outcomes for young parents ages 14 through 24. The theory of change for YPP is that a two-generation approach helps both generations make progress together and provides interventions that can break the cycle of multi-generation poverty.² YPP supports positive outcomes across three domains; Education and Career; Life and Personal; Parenting and Family.

DTA is taking a two-generation (2Gen) approach to increasing economic security for families by creating opportunities for and addressing the needs of both parents and children together. The 2Gen approach recognizes that outcomes for parents and children are intertwined and cannot develop independently of one another. Research has documented the impact of a parent's education, economic stability, and overall health on a child's trajectory. Similarly, children's education and healthy development are powerful catalysts

² "Two-Generation Playbook" Ascend, The Aspen Institute (ascend.aspeninstitute.org)

for parents. By promoting education and supports for children along with tools to improve parents' economic situation outcomes for both the parent and child will improve. The theory of change for the YPP is that a two-generation approach helps both generations make progress together and provides interventions that can break the cycle of multi-generation poverty.

Through the Young Parents Program DTA seeks to:

- Empower parents to pursue a path to economic mobility through education pathways and job readiness, while establishing support networks that allow parents to successfully access and maintain active benefits.
- Actively engage participants to develop the skills necessary to advocate and care for their children so that ultimately the children in this program are safe, healthy, and thriving.
- Provide a sense of hope and aspiration to empower families to break the cycle of multi-generational poverty through sustained school and community involvement and engagement with the program.

Empowering to Employ

Empowering to Employ is a partnership between DTA and the Massachusetts Rehabilitation Commission (MRC) that maximizes employment opportunities for workforce engagement for TAFDC families and clients with disabilities. This initiative was launched on July 1, 2018, with a shared commitment to establish an integrated employment model for individuals with disabilities receiving TAFDC leading to sustained employment, economic independence, and family stability.

DTA and MRC use a jointly funded model of client engagement and intensive co-case management to provide individualized and meaningful services with the goal to:

- Shift the paradigm from exemption due to a disability to individualized vocational supports needed for employment,
- Work in partnership with local teams to identify “best practices” for improved employment-related outcomes for clients with disabilities and their families,
- Engage and sustain TAFDC clients in meaningful employment-related activities that lead to jobs in high demand industries,
- Develop and “test” an intensive co-case management model to promote, engage, and support clients on their path to economic stability.

Although DTA clients have always had access to MRC services, this initiative streamlines the enrollment process and allows DTA to take a targeted approach to connecting potential participants. Both agencies have been committed to learning each other's services, developing strategies to blend agency strengths, and creating a process to meet the needs of individuals and families, with the goal of connecting participants to the workforce.

Secure Jobs – Workforce Services for Homeless Families

DTA collaborates with the Executive Office of Housing and Livable Communities (EOHLC) to administer the Secure Jobs Program, which was created through a partnership between the Fireman Foundation and the Massachusetts Interagency Council on Housing and Homelessness. Secure Jobs supports families in increasing their economic mobility by connecting them with housing supports and community-based providers. These providers focus on helping families become employment ready, while addressing any barriers that may interfere with their economic mobility goals. The model of the Secure Jobs Program emphasizes employment first to shorten the length of stay in shelter and expedite the attainment of permanent housing, contributing to upward economic mobility and family stability. Secure Jobs focuses on three key domains: Education and Career, Stable Housing and Economic Stability, and Family Stability and Well-Being. Participants have access to flexible funds, which are used to address individual barriers to employment. By connecting housing and workforce development services, Secure Jobs offers comprehensive supports that families need to obtain employment through client-centered economic mobility plans tailored to their individual needs.

Secure Jobs serves families receiving assistance from EOHLC in the areas of Boston, Brockton, Fall River, Taunton, Hyannis, New Bedford, Framingham, Lawrence, Lowell, Holyoke, Springfield, and Worcester. Through Secure Jobs, DTA and EOHLC have also aligned policies to reduce barriers for our shared families that support the best outcomes. The Moving to Work Funds made available to DTA from EOHLC have allowed for 50 Mobile Section 8 Vouchers to be distributed through lottery over three years to Secure Jobs participants who have obtained and maintained employment for six months.

Many of the hallmark innovations, including flexibility for participants and alignment between housing and employment services, have been retained as the program continues to grow. Increased funding for the program has allowed for enhanced services to be made available to support increasing employment outcomes and Secure Jobs programming is now available in more communities in the Commonwealth. DTA, in collaboration with EOHLC, remains committed in partnership to continuing the work in support of economic mobility for homeless children and families.

Eligibility for Secure Jobs is based on Executive Office of Housing and Livable Communities (EOHLC) eligibility. The EOHLC eligibility criteria include residing in an Emergency Assistance shelter or receiving Residential Assistance for Families in Transition (RAFT) or HomeBase funds. Receipt of TAFDC benefits is not a requirement for eligibility, however participation in the program does satisfy the TANF work requirement.

DTA/MassHire Work Participant Program

Since the passage of WIOA, DTA has worked closely with the Executive Office of Labor and Workforce Development (EOLWD) to implement a new, more integrated system of workforce development for DTA clients and other priority populations with significant barriers to work.

The aim of this collaboration is to:

- Develop meaningful pathways to work and economic mobility for low-income, disabled and chronically un/underemployed individuals/families, and
- Ensure that DTA clients and families with significant barriers can access the workforce system with the support needed to attain and sustain employment.

This partnership has allowed DTA to provide additional employment support to TAFDC and SNAP clients through the network of MassHire Career Centers in the Work Participant Program (WPP). Through WPP, clients receive access to individualized career counseling and guidance, workshops, job fairs, employer recruitment, and access to free resources to assist with their job search and applications.

DTA continues to increase investment in career services for clients in receipt of public benefits through WPP. Since the execution of the preliminary ISA in FY17, this partnership has resulted in significant progress. The percentage of the MassHire customer base who are also TANF and SNAP clients has significantly increased from 6% in FY17 to more than 20% in FY23 [TANF/SNAP: 20,396 Total Served: 10,2734]

An additional employment and training support offered to DTA clients includes ensuring access to High School Equivalency Testing (HiSET) or General Educational Diplomas (GED) testing. Effective September 2022, Massachusetts made high school equivalency testing free for individuals. DTA ensures that clients are aware of this important benefit and that they are connected to adult basic education programming, prep resources and understand the registration and testing process. Testing is completed through centers certified by the Massachusetts Department of Elementary and Secondary Education (DESE).

DTA also provides transportation reimbursement, subject to funding, for TAFDC clients participating in qualified work activities of up to \$80 per month. TAFDC clients and certain former TAFDC clients are eligible for childcare services accessed through referrals to their local Childcare Resource and Referral (CCRR) agency. The CCRR will explain the types of available childcare and provide a list of childcare providers with openings or arrange for childcare at home or with a relative. After the childcare provider has been contacted and arrangements are finalized, the CCRR will provide a voucher that covers the cost of the childcare program.

SNAP Path to Work

The SNAP Path to Work program offers Supplemental Nutrition Assistance Program (SNAP) recipients who do not receive TAFDC benefits opportunities to gain skills, education, and experience necessary to secure and maintain regular employment and economic mobility. This is done through vocational skills training, education, job search training, job search

assistance, and job retention services offered to voluntary participants statewide through a growing network of contracted providers. Resources and Services: Adult Education and ESOL Adult and Community Learning Services (ACLS), a unit at the Massachusetts Department of Elementary and Secondary Education, provides educational services to adults with academic skill levels below 12th grade, and/or adults who need English language skills to succeed in our communities. Through both federal and state grants, ACLS funds a broad network of education providers, including local school systems, community-based agencies, community colleges, libraries, volunteer organizations, correctional facilities, and others. The goal is to establish free access for eligible undereducated and limited English proficient adults, age 16 and older, to highly effective adult education services in the sixteen Local Workforce Areas in the Commonwealth. The purpose of the services is to assist adult students to achieve their education and career goals as family members, workers, and community members, and prepare them to successfully take their next steps toward those goals, in college and further training, at work, and in the community.

Adult education supports innovative programs providing services, that:

- assist eligible individuals in attaining a secondary school credential and in the transition to postsecondary education and training, including through career pathways; and
- assist immigrants and other individuals who are English language learners to improve their:
 - reading, writing, speaking and comprehension skills in English; and
 - mathematical skills;
- assist institutionalized individuals to obtain the education and skills necessary to reduce recidivism and facilitate:
 - re-entry to the workforce;
 - further education and training or employment upon release;
 - economic self-sufficiency; and
 - smooth transitions in their roles as family members and citizens;
- accelerate participants' educational and career advancement by providing eligible individuals with ESOL services including civics education or pre-ASE and ASE services offered concurrently and contextually with local area workforce preparation and training activities that result in students attaining one or more industry-recognized credentials.

The adult education system provides other services and programs including:

Out-stationing	The purpose of out-stationing is to help eligible individuals access adult education services by assisting MassHire Career Center staff with intake, assessments, and referrals to adult education programs in the local area and educate current students about career center services.

Workplace Education	Programs create partnerships among education providers, business partners and unions (where the workforce is unionized) to identify needs for instructional services for adult incumbent workers. Services integrate ABE/ESOL with industry skills training/work readiness to develop increased economic self-sufficiency and a more productive workforce.
Transition to Community College	Programs provide a foundation of services within Massachusetts community colleges that enable adult learners to transition into and ultimately complete postsecondary education.
Primary Instruction by Volunteers	Programs provide access to highly effective adult education services to eligible adults who cannot or will not enroll in class-based instructional services at a Community Adult Learning Center.

Resources and Services: Re-Entry Partnerships with MassHire

TWO YEAR UPDATE

Massachusetts' work to support the integration of formerly incarcerated individuals into the state workforce system continues. This includes improved mechanisms for measuring success, exploring use of digital tools to help jobseekers identify and develop in-demand skills aligned with in-demand jobs, and a pilot initiative through which MassHire Career Center staff provide orientations on available career services to individuals who are incarcerated in partnership with the Department of Corrections. Labor and Workforce is continuing to partner with other agencies to provide resources, expertise, and employment opportunities. EOLWD has also awarded \$2.2 million in Re-entry Workforce Development Demonstration grants to 11 organizations to train 389 formerly incarcerated individuals in building skills for in-demand industries such as energy-efficiency, hospitality, and manufacturing. Training funded through the re-entry workforce development demonstration grants will assist formerly incarcerated individuals re-enter the workforce.

Massachusetts has an incarceration rate of 275 per 100,000 people. Approximately 16,000 individuals are in prison or jail in the Commonwealth ([Prison Policy Initiative 2023](https://prisonpolicy.org/profiles/MA.html)). prisonpolicy.org/profiles/MA.html. MassHire continues to work toward building partnerships to increase access to high quality workforce services for formerly incarcerated individuals returning to the workforce.

MassHire Department of Career Service is collaborating with other public agencies to build career pathways and accelerate employment for formerly incarcerated individuals (referring to any constituent with a criminal record and/or arrest record, including individuals who were in the past in prison or jail, in pretrial detention, in juvenile justice facilities at the local,

state, and federal level, or may be on probation or on parole). “Re-Entry services” refers to career development activities administered by the public workforce system to support skill attainment and career growth for formerly incarcerated individuals and potentially for individuals who are currently in prison or in jail.

Massachusetts is exploring a strategy which acquaints incarcerated individuals with the workforce system during their internment. When these incarcerated citizens do return to their communities, barriers to employment are significant. Over the next four years, Massachusetts will expand its approach to supporting both populations: those incarcerated currently, and those who have been released. This marks a change in the system’s approach, which was previously to focus on job seekers after their sentences were served.

Re-Entry Services at the Local Level

Each MassHire Workforce Board and MassHire Career Center builds relationships with state and county correctional facilities, to support formerly incarcerated individuals and incarcerated citizens with reintegration activities.

An example of this work includes a best practice model in Hampden County. Hampden County Re-Entry Partnership (HCRP) consists of the multiple facilities within the Hampden County Sheriff’s Department, including the MassHire Holyoke Career Center and MassHire Springfield Career Center, and the MassHire Hampden County Workforce Board. The Board works with formerly incarcerated individuals to overcome known barriers through connection with community and business partners. In Hampden County, 3729 reentry customers received 36,594 workforce readiness and retention services over a three-year period (2020-2023).

MassHire Holyoke’s Massachusetts Recovery Ready Workplace (RRW) initiative stands at the forefront of fostering inclusive workplaces for individuals recovering from substance use disorders. This trailblazing program aids businesses in creating a supportive and stigma-free environment, emphasizing education, and understanding. The initiative’s impact is twofold: it supports individuals on their recovery journey and simultaneously boosts workplace productivity and culture. So far, over 40 companies have engaged with the program, with 21 fully committed to the RRW pledge and more in the process of joining. This initiative aligns with President Biden’s Recovery Ready Act, reinforcing its significance in building a healthier, more resilient community.

Reentry Services at the State Level

In 2024, EOLWD will work with appropriate state agencies, community organizations, and businesses to establish a workgroup to support the reemployment and integration of formerly incarcerated individuals. This workgroup may explore:

The utility of a Re-entry Unit at the state level comprised of central office staff;

- Expanding the capacity of the workforce system to serve formerly incarcerated individuals by building formal regional connections between public safety, education, and health services;
- Implementing data tracking and analysis needed to evaluate the impact of programming; and

- Understanding what role, the workforce system might play in the reduction of recidivism.

MassHire Department of Career Services and the Executive Office of Labor and Workforce Development are coordinating involvement with the [*Massachusetts Prison Education Consortium — The Educational Justice Institute at MIT*](#), teji.mit.edu/mpec a joint initiative supported by the [Vera Institute vera.org/newsroom/vera-awards-250-000-grant-to-establish-consortium-in-massachusetts-to-support-postsecondary-education-in-prison](http://vera.org/newsroom/vera-awards-250-000-grant-to-establish-consortium-in-massachusetts-to-support-postsecondary-education-in-prison) and the [Educational Justice Institute teji.mit.edu/](http://teji.mit.edu/) at the Massachusetts Institute of Technology, which “supports a postsecondary education continuum for currently and formerly incarcerated people.” MDCS and EOLWD are engaging with MPEC through a workforce lens, and providing information regarding employment resources for the education, correctional, and workforce practitioners who comprise the group.

The Commonwealth of Massachusetts MassHire Department of Career Services will work with the Executive Office of Public Safety and Security, the Department of Corrections, MassHire Career Centers and MassHire Workforce Boards, and businesses to develop strategies to support this target population through staff training and reemployment models for formerly incarcerated individuals, with particular focus on marketing hiring incentives such as the Work Opportunity Tax Credit and the Federal Bonding Program businesses.

The Executive Office of Labor and Workforce Development MassHire Department of Career Services (MDCS) maintains a Fidelity Bonding Program (via a demonstration grant) MDCS holds 820 bonds to help individuals with criminal records with employment opportunities. Federal Fidelity Bonds, also referred to as bonds, protect the employer against losses incurred due to illegal actions by a bonded employee and are conferred through the Federal Bonding Program (FBP). The goals of the FBP are:

- To improve employment outcomes for persons with criminal records;
- To educate employers and partners about the availability of fidelity bonds, and the purpose of the Federal Bond Program;
- To supply MassHire practitioners with a hiring tool for persons with criminal records; and
- To perform outreach to employers and encourage them to hire persons with criminal records.

Through inter/intra-agency partnerships at the state, regional, and local levels, and through direct engagement with businesses in key industries, the public workforce system continues to work toward the development of new reentry strategies and resources for currently incarcerated job seekers and post-release job seekers with criminal records.

Resources and Services: Individuals with Disabilities

TWO YEAR UPDATE

[MassAbility \(formerly the Massachusetts Rehabilitation Commission\) continues to provide comprehensive support services across the Commonwealth. \(See § 6\)](#)

The major resources and support services for individuals with disabilities are administered through the Massachusetts Commission for the Blind and the Massachusetts Rehabilitation Commission (NOTE: The Governor has filed legislation H.4161 proposing to change the Massachusetts Rehabilitation Commission's name to MassAbility)

Massachusetts Rehabilitation Commission

The Massachusetts Rehabilitation Commission's Vocational Rehabilitation program provides services to all individuals with disabilities over the age of 14, including students, youth, and adults so they can obtain and maintain employment. This program is administered by the state and governed by the rules and regulations put forward by the Rehabilitation Act of 1973 as amended by the Workforce Innovation and Opportunity Act of 2014. These programs are funded primarily by Federal monies along with the Commonwealth matching those funds. The main goal of this program is to assist people with disabilities to choose, obtain, and maintain competitive employment. Services offered include:

- Job-driven competitive employment and training services, including job placement services, partnerships with employers, on-the-job training (OJT), work-based learning experiences, paid internships, with a focus on high-growth industries and employment opportunities.
- Pre-employment transition services for both eligible and potentially eligible students with disabilities.
- Vocational counseling, guidance, and career development.
- Vocational assessments and testing, job matching services, and job search assistance.
- Provision of assistive technology to assist in obtaining and maintaining competitive employment.
- Assistance, support, and guidance for post-secondary educational opportunities.
- Medical and therapeutic services to assist with obtaining and maintaining employment.
- Consult with employers about the Americans with Disabilities Act, employment tax credits, and accommodations and modifications to assist individuals with disabilities to go to work.
- Ongoing employment support services to individuals with disabilities to maintain and advance in employment, including job coaching and counseling support.

The Massachusetts Rehabilitation Commission (MRC)/DMH Employment Initiative provides an integrated employment framework to ensure full employment for people with mental health needs at the same rate of employment as the general population. The focus of this

initiative is on individuals served by DMH through Adult Community Clinical Services (ACCS). These individuals are being referred to MRC for Vocational Rehabilitation Employment Services. To serve these individuals, MRC is using an Integrated Resource Team approach, where partner agencies and supports come together to craft and jointly own a Job Seeker's employment goal, to coordinate wrap-around services and ongoing collaboration and communication.

The MRC Competitive Integrated Employment Services (CIES) program provides assessment, skills training, job placement, initial support, interim support, and ongoing support services to assist consumers in their efforts to choose, obtain, and maintain competitive employment in an integrated work setting. Through the six CIES service components, consumers receive individualized services and supports they need to achieve and maintain successful employment opportunities throughout the Commonwealth of Massachusetts.

The **Massachusetts Commission for the Blind (MCB)** - provides employment-related services to eligible participants of the Vocational Rehabilitation (VR) Program beginning at the age of 14. Vocational Rehabilitation Services offered include:

- Evaluation and counseling to identify job goals;
- Assessment of work sites and the need for assistive technology;
- Assistive technology, orientation and mobility instruction, and rehabilitation teaching to enable blind persons to be independent at work;
- Providing funds for college or vocational training;
- Job counseling;
- Pre-employment transition services;
- Supported employment services;
- Short- and long-term internships; and
- Mentorship

Resources and Services: Youth

[TWO YEAR UPDATE: Massachusetts continues to prioritize workforce development for youth and young adults. In addition to improvements in the Connecting Activities program to provide immersion learning opportunities to high school students and develop work-based learning opportunities that focus on exposing students to in-demand occupations based on labor market research, this program also supports career counseling and experiential work-based learning.](#)

[Individuals participating in the WIOA youth program continue to receive access to the required 14 program elements:](#)

- [1. Tutoring, Study Skills Training, and Dropout Prevention](#)
- [2. Alternative Secondary School Services / Dropout Recovery](#)
- [3. Paid and Unpaid Work Experience](#)
- [4. Occupational Skills Training](#)
- [5. Education Offered Concurrently with Workforce Preparation and Training](#)
- [6. Leadership Development Opportunities](#)
- [7. Supportive Services](#)

8. Adult Mentoring
9. Follow-Up Services
10. Comprehensive Guidance and Counseling
11. Financial Literacy Education
12. Entrepreneurial Skills Training
13. Services Providing Labor Market and Employment Information
14. Postsecondary Preparation and Transition Activities

Massachusetts also ensures exploration of and connection with Registered Apprenticeship programs, and the alignment of career exploration and educational programs with career pathways in priority industries to ensure a future pipeline to meet employer needs.

In October of 2024, MassHire Department of Career Services and MassAbility partnered to launch the NextGen Careers/MassHire Training Partnerships to enroll NextGen Career Youth into occupational skills training from Massachusetts Eligible Training Provider List. MassHire and MassAbility will continue to partner together to ensure youth and young adults with disabilities have access to career, training, and employment services that lead to competitive, integrated employment and long-term self-sufficiency.

MassHire WIOA Youth

Workforce Boards in each of the 16 workforce areas ensure the provision of services designed to help in school and out-of-school youth between the ages of 14-24 complete their secondary education, enter post-secondary education/training, or enter employment. Out-of-school youth and in-school youth receive comprehensive assessments, career planning, support services, alternative education, work-based learning experiences, and occupational skills training. These programs and services are available to youth and young adults throughout the Commonwealth and are accessed through MassHire Career Centers or WIOA Youth Service Providers.

Youth and young adults eligible for WIOA programs face a variety of barriers to completing education and entering employment, including but not limited to; juvenile justice involved, foster care, pregnant or parenting, homeless, or disability. Youth and young adults participating in the WIOA youth program also receive access to required program service elements that support financial literacy, leadership and development, and entrepreneurial skills.

Career and Technical Education (CTE)/Perkins

Building on input from industry, community organizations, educators, and economic development in WIOA regional planning in the summer of 2017, the Commonwealth of Massachusetts embarked on a new chapter in Career Technical Education (CTE) for its students, launching a “High-Quality College and Career Pathways” (HQCCP) initiative. This initiative is the outgrowth of a number of recent, complementary bodies of work that began several years ago in Massachusetts, overseen by the Massachusetts Workforce Skills Cabinet (WSC) and aligned to the state’s WIOA plan. The WSC was created by an [*Executive Order No. 560: Creating the Workforce Skills Cabinet*](#). [mass.gov/executive-orders/no-560-creating-the-workforce-skills-cabinet](https://www.mass.gov/executive-orders/no-560-creating-the-workforce-skills-cabinet) The Cabinet aligns the Executive Offices of Education, Labor and Workforce Development, Economic Development and Health and Human Services toward a

comprehensive economic growth agenda. The Cabinet is charged with creating and implementing a strategy to ensure that individuals can develop and continuously improve their skills and knowledge to meet the varying needs of employers in the Commonwealth.

The Commonwealth has developed a set of guiding principles that provide a powerful context for all HQCCPs, as well as a more specific set of characteristics that define these pathways. In addition to the state's nationally recognized Vocational Occupational Programs the state has launched two types of HQCCPs, referred to as "Innovation Pathways" (IP) and "Early College" (EC) in alignment with the Strengthening Career Technical Education in the 21st Century Act (Perkins V) requirements.

These pathways provide participating students in the Commonwealth with supportive, rigorous academic experiences and career development education relevant to their next steps after high school. All three pathway programs require:

- Equitable Access;
- Academic Pathways aligned to labor market information and workforce development priorities identified by regional WIOA blueprints;
- Enhanced Student Support;
- Connection to Career inclusive of work readiness and work-based learning activities; and
- Documented effective Partnerships with local Workforce Boards, Career Centers, industry and post-secondary partners.

Additionally, to support student awareness of CTE opportunities and to support student success, the Commonwealth launched My Career and Academic Plan (MyCAP) a statewide program for student-centered, multi-year planning tool designed to provide students with ongoing opportunities to plan for their academic, personal/social and career success.

Aligned to the WIOA Plan over the last four years, MA CTE collaborations has supported approval of **75** voc-tech programs, and approval of **75** Early College and Innovation Pathway programs, based on partnerships with **16** colleges and **19** workforce partners, and twenty five percent of high school districts have participated in MyCAP planning.

Connecting Activities

Connecting Activities is a Department of Elementary and Secondary Education initiative designed to support college and career readiness for students. MassHire Workforce Boards leverage Connecting Activities (CA) to establish partnerships between schools and businesses to provide structured work-based learning experiences for students that support both their academic and employment skill attainment. Students participate in a range of career-related activities including onsite placements for work-based-learning opportunities. Students in CA utilize the [Massachusetts Work-Based Learning Plan \(MWBLP\)](https://massconnecting.org/files/WBLP_ResourceGuide_Version3_0.pdf) https://massconnecting.org/files/WBLP_ResourceGuide_Version3_0.pdf to assess skills developed through worksite learning experiences. The MWBLP includes a job description, a description of the Employability Skills and Career and Workplace Specific Skills used in the

student's placement and a performance review section. The MWBLP is a tool used to measure gains made in employability and career readiness skills competencies.

YouthWorks

YouthWorks is a state-funded subsidized employment program for teens and young adults aged 14 to 25 living in low-income communities across Massachusetts, administered by Commonwealth Corporation on behalf of the Executive Office of Labor and Workforce Development. YouthWorks uses a model that is age, stage, and path appropriate, designed to increase the employability of teens and young adults through experiences that prepare, coach, and support them in job readiness, career pathways and job success. YouthWorks programs serve a wide range of participants in terms of ages, levels of career awareness, and goals. To better provide all participants with effective and relevant youth workforce development services, YouthWorks defines its offering into three specific tiers, which include service and project-based learning, early and career trajectory employment experiences, and career pathway training and support. YouthWorks increases the employment of teens through partnerships that prepare, coach, and support teens in job search and job success.

YouthWorks grants support programs are operated by a mix of MassHire Boards, MassHire Career Centers, and community-based organizations.

Adult Education (WIOA Title II)

Both the federal WIOA Title II and Adult Education state funded programs serve out-of-school youth through Adult Basic Education programming (including literacy through adult secondary education and English for speakers of other languages).

Massachusetts Rehabilitation Commission

Massachusetts Rehabilitation Commission makes Pre-Employment Transition Services available to all students with disabilities statewide who are eligible or potentially eligible for Massachusetts Rehabilitation Commission services. Potentially Eligible services are provided through network of community service vendors. Pre-ETS services consist of five service components:

- Job exploration counseling;
- Work-based learning experiences;
- Workplace readiness training;
- Counseling in Post-Secondary Education;
- Self-Advocacy

Massachusetts Rehabilitation Commission's NextGen Careers is an initiative to help young adults explore the world of work. NextGeners learn to advocate for themselves, gain confidants, and fast track their job journey. The target population is VR-eligible young adults with a disability age 18-30. Recruitment efforts focus on young adults with intellectual and/or developmental disabilities (ID/DD), Autism spectrum disorders, Sensory (Blind, Low Vision, Deaf, Hard-of-Hearing), and from underserved racial and ethnic groups (Black, Asian, and Latinx).

YouthBuild

YouthBuild provides services to youth and young adults between the ages of 16 and 24 that have a positive impact on life choices. YouthBuild programs offer a unique curriculum, that combines academic instruction with workforce development training. Participants engage in contextualized learning in the classroom and on the job site building and renovating affordable housing in their communities.

The Massachusetts YouthBuild Coalition (MYBC) consists of the eleven (11) operating YouthBuild programs in the Commonwealth of Massachusetts. All the Massachusetts programs are in the major urban areas across the Commonwealth in Gateway Cities. There are YouthBuild programs serving Boston, Brockton, Cambridge/Chelsea, Fall River, Lawrence, Lowell, New Bedford, Quincy, Salem/Lynn, Springfield/Chicopee/Holyoke, and Worcester. The coalition was formed in 1996 when there were six programs in the state and over the years has grown to its present level of 11 sites.

The MYBC has evolved over the years to its present state where one of the major missions is to provide technical assistance to all the programs, highlight best practices, and provide the best experience possible for the young people served. To that end we are particularly proud of some innovative practices that are unique in the YouthBuild world. We have instituted a system of peer evaluation to make certain that all our programs are providing quality services. Each program is evaluated by the Executive Director and the team of peer directors from other programs who look at every aspect of the program, including each program component, organizational quality, and best practices which can then be disseminated to other programs. In addition, MYBC has developed a Learning Academy. These Academies, which are held every year, provide training opportunities for all the staff at all the programs. We highlight topics that are especially pertinent at a given time and make sure that we engage the staff in the development of future training.

The Board of the MYBC is a collection of devoted members who believe in the mission of the Coalition. By working together to develop strategies for improvement as well as answers to concerns, we have developed a coalition that has served as a model nationally among the 250 programs in the United States as well as those around the world served by YouthBuild International.

Job Corps

Job Corps offers hands-on career technical training in high-growth industries that help youth and young adults 16-24 years of age get a GED or high school diploma. Job Corps also offers career planning, on-the-job training, job placement, residential housing, food service, driver's education, health and dental care, a bi-weekly basic living allowance, and a clothing allowance.

Resources and Services: Older Workers

TWO YEAR UPDATE

There is no longer a state-run SCSEP program in the Commonwealth (as of September 2025). Consistent with WIOA's integrated service delivery framework, individuals previously enrolled in the state-administered SCSEP program were encouraged to connect with MassHire Career Centers for employment services and access to training opportunities available through WIOA Titles I and III.

Governor Healy's Executive Order 642 seeks to embed age-friendly policies and practices throughout the work of the Commonwealth to improve the health and wellbeing of aging adults. EO 642 directs all Executive Offices and each agency, bureau, department, or political subdivision within or reporting to such Executive Offices; to coordinate a policy review to identify ways the goals of age-friendly policy and practice can inform agencies' programs and resources to best meet the needs of older adults in an efficient manner.

Massachusetts continues to incorporate age-friendly resources and service strategies including individualized career planning, customized workshops for jobseekers 55+, promotion of digital literacy and use of digital tools to help older workers develop and better understand transferable skills, compare career options, and identify training opportunities for- and employment in- good-paying jobs. MassHire Career Centers serve a significant population of older jobseekers, with approximately 22% of individuals served statewide aged 55 and older, underscoring the system's ongoing commitment to age-inclusive workforce services.

Senior Community Service Employment Program (SCSEP):

Administered by the Executive Office of Elder Affairs, the Senior Community Service Employment Program, funded under Title V of the Older Americans Act through the United States Department of Labor, enables us to help employ low-income individuals, age 55 and older, throughout the Commonwealth. SCSEP remains the only federal, person-centered, workforce development program targeted to serve older workers. The Government Accountability Office has identified SCSEP as one of only three federal workforce programs with no overlap or duplication.

Enrollees are placed in temporary training assignments where they gain valuable on-the-job work experience and training needed to gain employment in the private sector. The dual goal of the Senior Community Services Employment Program is to:

- Enable older low-income job seekers to develop the skills and self-confidence to obtain unsubsidized jobs and become financially self-sufficient; and
- Provide valuable community service at on-the-job training sites, to improve participant's self-sufficiency, perform meaningful civic service, and to strengthen communities.

These goals are achieved through multiple strategies, which includes the use of on-the-job-experience (OJE) with efforts to engage employers through outreach and recruitment to local employers whereby participants are placed at eligible training sites for which they are paid minimum wage for 20 hours per week. Another strategy is to provide technology and person-centered job search training program. EOEA will continue to provide these workshops in all service areas.

Implementing Skill Training is another primary focus as well, as EOEA assesses and evaluates MA-SCSEP enrollees' skills and job interests, while focusing on specific occupations and skill training pathways through WIOA vendors, community colleges and other low-cost training providers.

Resources and Services: Talent Pipelines for Business

TWO YEAR UPDATE

Governor Healey's Workforce Skills Cabinet continues to make strategic cross-Secretariat investments to support business and industry in the Commonwealth. As of December 2025, the state-supported Career Technical Initiative awarded over \$70 million to 34 vocational schools across the Commonwealth, resulting in expanded service to 4,600 adult learners. Additionally, over \$76 million in Workforce Competitiveness Trust Fund training dollars have been awarded since January 2023. The Workforce Training Fund Program has awarded \$24 million dollars across 2,500 grants to support 1,617 businesses in training over 21,000 incumbent workers.

After the submission of the 2024 WIOA State Plan, the Marker Maker initiative concluded (June 2025). Through the Market Maker initiative, best practices – such as more deliberately and intentionally connecting employers directly with training providers to ensure that training programs are delivering up-to date, industry relevant skills and have the equipment and technology necessary to prepare jobseekers for in-demand occupations – continue to be implemented and sustained across Massachusetts.

Market Makers also demonstrated that strong employer partnerships depend on coordinated outreach, consistent staffing, and clear, shared messaging across the workforce system. Regions that collaborated, shared data, and aligned their sector strategies saw stronger employer engagement and more effective training solutions. The initiative also highlighted the need for standardized data practices and dedicated conveners to maintain momentum and avoid duplication. Overall, Market Makers reinforced that a unified, equity driven approach leads to better outcomes for employers, jobseekers, and the statewide workforce system.

Career Technical Initiative

In January of 2020, the Workforce Skills Cabinet (WSC) launched the Career Technical Initiative (CTI) as a strategic response to the persistent demand for skilled labor within the construction, trades, and manufacturing sectors across the Commonwealth. Commonwealth Corporation administers CTI, providing funding and technical assistance to designated Chapter 74 vocational programs to build and to scale up their capacity to deliver training programs targeted at adults. CTI programs are designed in an “after dark” format, deliberately scheduled outside of regular school hours, thereby optimizing the use of vocational technical facilities. This approach results in the transformation of vocational high schools throughout the Commonwealth into “Career Technical Institutes” that operate three shifts a day, significantly expanding accessibility to hands-on education and training. The CTI model also provides integrated credentialing, comprehensive wraparound support, as well as placement services for participants. The population that CTI serves comprises Massachusetts residents who are currently unemployed or underemployed.

The strategic allocation of state and American Rescue Plan Act (ARPA) funds has facilitated the creation of new positions within the MassHire system, including regional MassHire Upskilling Navigators and Market Makers. CTI schools form collaborative partnerships with Market Makers and Upskilling Navigators to identify labor market needs within each workforce region, actively involve employers, recruit, and screen participants, and assist graduates in getting hired into jobs related to their field of training.

Through October 2023 over \$30 million have been awarded to 29 vocational schools across the Commonwealth, with over 1900 students served to date.

Market Makers

In May 2021, the WSC created Market Makers, roles housed within seven MassHire Workforce Boards across the Commonwealth. Market Makers assume key roles in actively engaging with employers, facilitating connections between employers, and training providers, identifying grant funding opportunities, assisting employers in the hiring process, and assessing employers’ workforce needs to connect them to trainers and state resources. These resources include the network of MassHire Career Centers, grants to train their incumbent workforce, and grants to build pipelines of skilled employees, which is a key focus. Market Makers guide employers to hire newly skilled workers from existing training programs and encourage employers/partnerships to apply for new ARPA funded grants to build skilled worker pipelines such as CTI, WCTF, and the SCALE planning grants.

Over \$2 million has been awarded to seven MassHire Workforce Boards to fund the Market Maker initiative. Through October 2023, Market Makers assisted over 130 employers and other partners in applying for apprenticeship, CTI, WCTF, and other grants and supports.

Workforce Competitiveness Trust Fund

An initiative created in 2006 and administered by Commonwealth Corporation on behalf of the Executive Office of Labor and Workforce Development, the Workforce Competitiveness

Trust Fund (WCTF) supports industry sector partnerships to develop training pipelines to meet the skill needs of businesses in high demand occupations. Each partnership includes businesses with common skill needs, educational institutions, workforce board/s, and other related partners. The partnerships provide training and education services for a two- to three-year period for industries including Health Care, Clean Energy, Life Sciences, Construction, Financial Services, and Hospitality.

Over \$67 million in WCTF funds have been awarded since 2013, supporting industry partnerships and a program infrastructure that allows workforce boards and their partners to add capacity through WIOA, TAA and other programs. These awards have resulted in over 2600 participants served over the last decade. Additionally, 55 partnerships have been supported through the WCTF since 2013; many of the partnerships continued beyond the grant period creating a platform for working strategically with critical industries to address their ongoing and changing workforce needs, while simultaneously helping workers acquire industry-recognized credentials and enter and advance in these sectors.

Workforce Training Fund Program

The Workforce Training Fund Program (WTFP) helps address business productivity and competitiveness by providing resources to Massachusetts businesses to fund training for current and newly hired employees through competitive grants. Companies must pay into the WTFP to be eligible to apply for grant funds.

Workforce Development Boards and Career Centers work closely with local employers to access the WTFP for their incumbent worker training needs. Training focuses on topics such as sales and customer service, English for Speakers of Other Languages (ESOL), and quality assurance. Grant programs include:

- General Program: Grants up to \$250,000 that are awarded competitively to employers, employer organizations, labor organizations, training providers, and consortia of such entities to train current and newly hired workers. Applicants may use a training provider of their choice.
- Express Program: Grants up to \$20,000 assist companies with 100 or fewer employees to address their employee training needs through a list of pre-registered courses. Eligible employers complete a short, online application to request grant funds for pre-registered training courses.

WTFP is supported through business contributions, raising approximately \$22 million each year. In FY2023, WTFP through its General Program and Express Program awarded \$39.1 million for 2,965 grants to support 1,669 businesses in training 30,340 incumbent workers.

Strengths and Opportunities for Workforce Development Activities

TWO YEAR UPDATE

Leveraging resources and aligning WIOA partner services are critical to delivering comprehensive workforce activities centered on the needs of job seekers and businesses across Massachusetts.

Building on this foundation, the Commonwealth will continue strengthening partnerships to expand apprenticeship and work-based learning opportunities, modernize training to reflect evolving skill demands, ensure programs remain closely aligned with employer needs, and broaden access to high quality jobs for residents across the state. Together, these efforts enhance the capacity of the workforce system and support a more responsive, inclusive, and opportunity rich labor market.

Alignment of Workforce System Strengths & Capacity to the Five Pillars

Pillar I: Industry-Driven Strategies

Building reliable talent pipelines led by industry and aligned with economic priorities.

Aligned Strengths & Capacity

- Regional Planning processes identify priority industries and occupations and guide local and regional investments.
- Industry-driven programs in high-demand sectors serve target populations, including veterans, youth, individuals with disabilities, and justice-involved individuals.
- Registered Apprenticeship Expansion creates structured, employer-led career pathways.
- Workforce Training Fund (WTF) supports incumbent worker training aligned with employer competitiveness and growth.
- Workforce Competitiveness Trust Fund (WCTF) builds regional infrastructure to respond to real-time industry needs and leverages private sector investment.
- Adult Career Pathways and Integrated Education and Training models align Adult Education with regional industry demand.
- Youth programs (WIOA Youth, YouthWorks, Connecting Activities) maintain connectivity to priority industries and occupations through work-based learning.

Pillar II: Worker Mobility

Bringing more individuals into the labor force and supporting advancement using LMI, career pathways, and supportive services.

Aligned Strengths & Capacity

- Broad access to labor market and career exploration tools (currently MassHire Job Quest Virtual Pathway, MassCIS, and Burning Glass, with expanded offerings in the future).
- WorkKeys curriculum supports foundational skill development and career readiness.
- Strong Veterans Services model, including DVOP and LVER staff, provides individualized services and employer outreach.
- Re-entry services support justice-involved individuals both pre- and post-release.
- Adult Education and Transition to College programs support postsecondary and career advancement.
- Youth programming emphasizes career-connected learning, work readiness, and occupational training.
- Services for older workers provide skill upgrading, community service experience, and pathways to economic self-sufficiency.
- TAFDC employment programs improve labor force participation and reduce reliance on supportive services.

Pillar III: Integrated Systems

Delivering coordinated, customer-centered workforce services through unified systems and partnerships.

Aligned Strengths & Capacity

- Unified MassHire brand across all Career Centers enhances system navigation for job seekers and businesses.
- One-stop delivery model integrates USDOL-funded programs under one roof.
- Statewide “Shared Customer” policy ensures coordinated service delivery across partners.
- Local MOUs formalize partner roles, cost sharing, and service integration.
- One common data system (MOSES) supports coordinated case management, reporting, and accountability.
- MassHire JobQuest enables self-service and staff-supported activities for customers.
- Customer flow agreements and customer-centered design improve service coordination, especially for individuals with barriers.
- Co-case management models with DTA, Adult Education, Vocational Rehabilitation, and other partners strengthen integrated service delivery.
- MassHire provides a no-wrong-door approach for businesses across agencies.

Pillar IV: Accountability

Ensuring measurable results by linking investments to outcomes.

Aligned Strengths & Capacity

- Performance-driven WIOA programs serving adults, dislocated workers, youth, veterans, and special populations.
- MOSES enables monitoring of participation, services, outcomes, and compliance.
- Regional planning aligns funding and strategy to documented labor market demand.
- WCTF and WTF link funding to employer outcomes, wage progression, and retention.
- Legislative reforms and coordinated TANF employment strategies improve labor force participation outcomes.
- Youth programs incorporate standards for high-quality career-connected programming.

Pillar V: Flexibility & Innovation

Advancing workforce innovation and adapting to economic and technological change.

Aligned Strengths & Capacity

- Flexible regional strategies allow local areas to design programs responsive to labor market conditions.
- Expansion of technology-enabled services through JobQuest and LMI tools.
- Innovative co-location and out-stationing models (Adult Education, DTA, VR).
- Pilot approaches serving justice-involved individuals, including incarcerated and formerly incarcerated individuals.
- Ongoing alignment of workforce strategies with evolving industry and AI-driven economic transformation.

Massachusetts will continue to improve, integrate, and modernize its systems consistent with the above and in alignment with the five workforce pillars.

(B) Provide an analysis of the strengths and weaknesses of the workforce development activities identified in (A), directly above. (C) Provide an analysis of the capacity of State entities to provide the workforce development activities identified in (A), above.

Leveraging resources and aligning WIOA partner agency program services are critical to workforce development activities that are comprehensive, and customer centered. The Commonwealth will continue to build on existing partnerships and develop new ones to expand capacity to deliver workforce development activities that meet a variety of needs for job seekers and business. The table below outlines the key areas of focus in this *State Plan*, addressing areas of strength, capacity and progress for the system and areas of opportunity to enhance capacity and maximize impact on the system’s customers.

Workforce Development Activities

(B) An analysis of the strengths and capacity of the workforce system is described below:

All Job Seekers and Businesses	MassHire operates under a unified brand across all career centers in the Commonwealth to help customers identify where public workforce development services can be accessed; unifies MassHire staff across workforce system to enhance and streamline the customer experience.
MassHire Career Centers (MCCs) and MassHire Workforce Boards	USDOL resources integrated under one roof for “one-stop” for customers in all MCCs. <i>Local MOUs</i> developed and signed by all required WIOA partners ensures locally driven, integrated workforce system. “Shared Customer” definition and policy developed by the state, and further articulated in local areas to ensure all partner services are provided and integrated at the MCC. Local “customer flow” agreements building on strong partnerships with social service entities, local service providers and non-profit organizations, particularly for serving those with barriers to employment (low-skilled, limited English proficient, etc.). “Customer Centered Design” elements integrated into the MCC to enhance the customer experience. One common data system (Massachusetts One-Stop Employment System (MOSES) - coordinate, schedule, monitor and report on virtually all service activities. MassHire JobQuest - allows job seekers and business to conduct activities such as create/modify their customer profiles, develop job postings, or search for eligible training providers. Enables customers to access self-service activities that augment the spectrum of staff supported services at MCCs. Strong Veterans Services – MCC staff are available in each comprehensive career center to provide employment and training services to Veterans and their eligible spouses. MCC staff ensure Veterans and their eligible spouses receive priority of service (POS). Local Disabled Veteran Outreach Persons (DVOP) maintain direct contact and coordination with homeless Veteran shelters, the VA, and local area community organizations that provide direct services and training program opportunities leading to gainful employment

	and self-sufficiency. DVOPs provide Individualized career services to JVSG eligible Veterans and other eligibles with significant barriers to employment. Two (2) Local Veteran Employment Representatives (LVERs) conduct outreach to employers, organizations, and other service providers to assist Veterans in gaining employment. Regional Planning defines priority industries and occupations for the region; programs in “high demand” careers are being designed and run by local partners to serve target populations such as Veterans, youth, and formerly incarcerated individuals. Regional planning also aligns strategic initiatives and funding to locally driven regional blueprints to create career pathway opportunities for customers of the workforce system. Availability of multiple labor market tools to help inform job seekers’ decisions related to careers or business needs. These include: The Massachusetts Career Information System (MassCIS), portfolio tool that enables users to explore career outlooks, as well as knowledge, skills and abilities, and educational requirements. Transferrable Occupational Relationship Quotient (TORQ): An easy to navigate, easy to understand career exploration tool based on O*NET occupational competency profiles. MassHire BizWorks helps to ensure businesses are accessing the right resources to fit their needs; transcends across multiple partners and agencies to ensure there is no “wrong door” for businesses. Burning Glass Labor Insight: a tool that uses real-time data to identify emerging industry and occupational trends, find people jobs, and local employers in a specific industry, or to identify the industry category for a specific employer to find out more about what they do and what kind of workers they employ. WorkKeys Curriculum available to MCCs offer an opportunity for job seekers to enhance foundational workplace competencies (reading, math, and graphic literacy) as well as soft skills and financial literacy. Tool is also shared with many Adult Education programs. Registered Apprenticeship Expansion creates more career pathway opportunities for shared customers in the workforce system
Resources and Services for Individuals Receiving TAFDC	Work Program Participant Program (WPP) leverages the resources and expertise of DTA and MassHire services to boost employment outcomes for people on public benefits.
Department Transitional Assistance Employment Services Programs	TAFDC applicants who are eligible for Pathways to Work services are encouraged to register with MassHire JobQuest upon benefit application. For those applicants who are presumed to be subject to the TANF work requirement, JobQuest registration is required prior to benefit approval to facilitate a faster introduction to employment supports, training, and education and supportive services. Legislative reforms assist in smoothing transition period from receiving public benefits to economically self-sufficient families. Improved performance regarding labor participation rates. Each local DTA office has case managers and Full Engagement Workers (FEWs). Case managers carry a caseload and are responsible for eligibility determination, eligibility review, referral services and other case maintenance activities. FEWs are specialists in the employment, education, and training opportunities available to families receiving TAFDC. In partnership with the case manager, the FEW is responsible for connecting families to opportunities and supportive services. They serve as a resource to case managers, a liaison for employment and training program providers and a point of both contact and support to families. They work on both initial engagement with education and training options and re-engagement for families who have stopped participating in an approved activity. FEWs

	work closely with local employment and training programs, and work with other community partners such as shelters to reach and engage families regardless of their circumstances. There is a strong relationship with TAFDC and local providers. DTA Full Engagement Workers maintain a regular presence at MassHire Centers and other provider sites to facilitate co-case management to support client engagement and to more effectively coordinate services with DTA case managers.
Adult Education	The Adult Education system (federal and state funds) serves thousands of adults who are low skilled, basic skills deficient, lack English proficiency, lack a high school diploma or its equivalent and it helps them close the educational gap and qualify for further opportunities. The Adult Education system engages a wide range of program providers (including employer partnerships for workplace education) to meet the needs of various communities with specific barriers. Adult Education supports postsecondary success through the Transition to College programs. Adult Career Pathways programs provide an opportunity for MassHire (Boards and Career Centers) to collaborate regionally on creating career pathways for Adult Education students. Out-stationing (an Adult Education staff person onsite at an MCC) has been institutionalized over the years and connects MCC with the Adult Education system. Adult learners are exposed to level appropriate workforce preparation activities that help them plan for next steps after Adult Education services. Local Adult Education representatives were involved in the MCC operator selection process and the local MOU development, ensuring system partners were adequately meeting the needs of adult learners. Regional Planning is influencing Adult Education's alignment with priority industries and occupations, and thus the broader workforce system. Locals are developing regional integrated education and training (adult career pathways) models that leverage training resources for Adult Education students. Many MCCs have been mapping out service pathways for adult learners across adult education and MassHire, establishing referral protocols and cross agency collaborations
Re-Entry Services	Excellent coordination at local level with sheriffs' departments to provide career center services for incarcerated job seekers. A growing number of Career Centers support long term relationships with businesses owners willing to hire individuals with criminal records, initiated through proactive business outreach. MCCs are increasingly viewing the reentry population as including not only formerly incarcerated individuals, but also individuals serving time currently. In response to the need behind the wall, MCCs are exploring methods to bring staff and career development resources into prisons and jails.
Services for Individuals with Disabilities	The Vocational Rehabilitation agencies' (Mass Rehabilitation Commission, Mass Commission for the Blind) engagement as committed partners of the workforce system facilitate consumers with disabilities to access to broader support and workforce services. MRC and MCB conduct accessibility audits of MCCs to ensure tools and resources are accessible for people with disabilities. MRC partners with MassHire to create opportunities for MRC customers to engage in occupational skills training to ensure job seekers are entering pathways to high growth industries and occupations.

	MRC has partnered with MassHire BizWorks to streamline employer engagement and engage in joint professional development for staff. MRC and MassHire partner to identify and enroll MRC consumers into workforce training from the Eligible Training Provider List.
Services for Youth WIOA Title I Youth Program	The program operates at a large scale and impacts thousands of young people each year. In-school youth 14-21 and out-of-school youth 16-24 receive access to a range of program services including comprehensive assessments, career planning, support services, alternative education, work-based learning experiences, and occupational skills training. WIOA Title I is designed to serve youth with barriers to entering employment as well as completing education. Through WIOA Title I, youth are provided with opportunities and resources that prepare them for successful participation in the labor force. 1. Connectivity with target industries and occupations as identified through Regional Planning 2. Identification of standards for high quality career-connected youth programming 3. Direct engagement and coordination between MassHire Workforce Boards and local high schools 4. Use of shared workforce preparation tools, such as Signal Success, across youth workforce programs
Connecting Activities	The program provides work-readiness preparation for in-school youth through a formal curriculum.
Youth Works	Creates an early “entry point” into a talent pipeline by providing experiences such as occupational skills training and/or sector specific work-based learning. Offers a tiered program that meets the needs of participants at any age, stage, and path, including service and project-based learning and career pathway training and support. Alignment with Connecting Activities and other strategic partnerships with key workforce and education programs.
Services for Older Workers	Program participants provide invaluable community service in public and private non-profit agencies (host agencies) by increasing the capacity of host agencies to address community needs. Provides career pathways and skill upgrading through the community service assignment for otherwise chronically unemployed individuals with multiple barriers to employment. Fosters individual economic self-sufficiency, and social and emotional well-being.
Talent Pipeline Initiatives for Business	Dedicated funding for Incumbent Worker training tied to a business need that is related to competitive position and growth. Directly supports training for jobs that are in demand.
Workforce Training Fund	Business-friendly; promotes strengthening of employer relationships. Supports small businesses through the General Program, Express program, and Small Business Direct Access program. Express Program Course Directory provides a compendium of approved courses and makes it easier for businesses to identify relevant training for employees.
Workforce Competitiveness Trust Fund	WCTF funding focuses on populations with challenges to employment, including those experiencing “cliff effects” (Learn to Earn). Leverages private sector investments (there is a 30% required match). Creates critical infrastructure in regions to engage with businesses to understand their needs as the industry goes through changes and can adjust strategy real-time.

(C) An analysis of the opportunities to enhance the capacity of the workforce system is described below.

All Job Seekers and Businesses	Improve and integrate MassHire and partner data systems to create operational efficiencies, as well as bolster the system's analytical capacity.
MassHire Career Centers (MCCs) and MassHire Workforce Boards	Demand for subsidized training vouchers for customers exceeds funding availability. Increase MCC access during evenings and weekends to mitigate challenges for customers who cannot visit the career center during traditional business hours (e.g., incumbent workers, those engaged in programming with partners, etc.). Expanding access points for career center services, including online, through co-located staff, and through community partners. Integrated education and training models for partner customers (e.g., ABE students). Expand career pathway opportunities to those with challenges to employment through registered apprenticeship expansion. Increase capability to better track and match job candidates to available jobs through enhanced applicant tracking capabilities. Streamline business experience to position the workforce system as an attractive resource to meeting a business workforce needs.
Resources and Services for Individuals Receiving TAFDC	Work Program Participant Program (WPP) leverages the resources and expertise of DTA and MassHire services to boost employment outcomes for people receiving public benefits.
Department Transitional Assistance Employment Services Programs	DTA has redesigned the TAFDC work program to expand the number of TAFDC recipients connected to the MSCCs immediately upon application via registration with JobQuest. Full Engagement Workers assess those registering as a condition of application to determine readiness for WPP or alternate resource, such as CIES, to increase the number of TAFDC recipients being enrolled within the first 60 days after benefit approval and improve identification of barriers to participation prior to referral to increase resulting enrollments and successful participation. DTA will continue to identify new opportunities to coordinate with and integrate services currently being provided to TAFDC recipients by other Massachusetts partner agencies responsible for workforce development. To support this effort, DTA's WIOA Coordinator will continue to provide oversight and management of the WPP ISA with MDCS, serve as a DTA Central Office liaison to the local MassHire Workforce Investment Boards and further develop and strengthen local partnerships. DTA and DCS are partnering to develop and implement new training and skill development models for engagement staff that reinforce co-case management and coaching models to better assess the unique needs of TAFDC recipients and improve the process for referral for Title I funded training when appropriate in addition to WPP. There are a limited number of providers in rural areas. This creates access barriers to individuals with transportation issues or lack access to technology that would allow them to engage in virtual or remote programming. Additionally, resources for occupational skills training and ESOL do not match demand in many geographic areas. Many ESOL programs maintain extensive wait lists. There is opportunity to explore increased partnerships with community colleges Expanding collaboration between public assistance programs and workforce partners, including EOLWD and the Commonwealth Corporation to identify additional policy and procedural opportunities to further address the impacts clients experience through benefit cliffs as they make employment decisions while on public benefits. Continued partnership between agencies on increasing efficiencies in the enrollment process and managing client expectations in order to connect them to the most impactful services. Enhance data and case management platforms to collect and share data more seamlessly, and report on shared outcomes between workforce and community partners.

	Leverage partnerships and collective workforce system resources to serve clients of various needs.
Adult Education	Due to significant barriers and low educational levels many Adult Education and ESOL students require years of ABE/ESOL before they can benefit from the opportunities of the workforce system. To deepen relationship with workforce system partners to ensure productive student multi-year engagement (e.g., career pathway development, etc.). To support the out-stationing model with a system to track referrals and cross agency collaborations. To partner with the Adult Education and workforce systems in connecting Adult Career Pathways participants to relevant training, apprenticeships, and jobs. To scale up successful regional integrated education and training (adult career pathways) models that leverage training resources for Adult Education students. For the workforce system to provide Adult Education staff with a better understanding of regional labor market needs through shared use of labor market tools and regional planning. To continue connecting Adult Education out-of-school youth population with YouthWorks programs and WIOA Youth programs.
Re-Entry Services	Opportunity for the Federal Bonding Program and Work Opportunity Tax Credit to be packaged together as part of an incentive package to support companies hiring individuals with criminal records, which would inform a strategy to market formerly incarcerated individuals to businesses. Anti-carceral youth organizations (e.g., UTEC in Lowell) are interested in developing relationships with the workforce system to support their constituents. Through a central reentry unit, MassHire would pursue relationships in that network of organizations which, although they work with the reentry population, are not themselves correctional facilities. Increasingly, private, and public universities are pledging to support secondary education access in prisons and jails (e.g., the MA Prison Education Consortium). The public workforce system has begun planning to coordinate with these entities to support career pathways and work-based learning models which are fully accessible to individuals in prisons and jails.
Services for Individuals with Disabilities	To increase engagement of vocational rehabilitation services to align with state and regional priority industries and occupations. To expand avenues of engagement for people with disabilities in career pathway workforce services, such as apprenticeship and other work-based learning opportunities
Services for Youth WIOA Title I Youth Program	Enhanced alignment with other publicly funded workforce development programs. Enhanced alignment of occupational skills training to priority industries and occupations and to build capacity for pre-apprenticeship and apprenticeship programs. To engage more private-sector employers to provide subsidized, partially subsidized or unsubsidized employment opportunities for young people. To focus on job quality of the job placement and career growth for young people and to streamline workforce services across both the in-school and out-of-school youth program spectrums. To make connections to out-of-school youth population transitioning out of secondary school, enrolled in the Adult Education system, or connected with other youth workforce programs. A renewed focus on private sector employer engagement strategies to strengthen existing local partnerships and open doors to new opportunities especially in priority sectors.

	Provide staff with professional development to support leadership and career development for young adults and engage existing and potential employers.
Connecting Activities	Create and build on existing connections with WIOA Title I Youth programs to provide Connecting Activities as a resource for in-school youth.
Youth Works	Streamline pipelines for WIOA Title I eligible youth to participate in Youth Works in-school and year-round programs.
Services for Older Workers	Explore mitigation of staff turnover due to reliance of most SCSEP projects on participant staff members whose maximum participation duration is 48 months. Leverage workforce partners to provide access to wider services and opportunities.
Talent Pipeline Initiatives for Business	Leverage registered apprenticeship, WIOA, youth funding, and other federal funding streams to provide training for jobs in demand. Application process can be slow for businesses without human resources capacity.
Workforce Training Fund Program	Align the WTFP Express Program Course Directory with Eligible Training Provider List as well as a Credential of Value list (in development).
Workforce Competitiveness Trust Fund	Streamline industry sector partnerships to priority industries and occupations as identified through Regional Planning.

State Strategic Vision and Goals

The *Unified or Combined State Plan* must include the State's strategic vision and goals for developing its workforce and meeting employer needs, in order to support economic growth and economic self-sufficiency. This must include—

- (1) Vision. Describe the State's strategic vision for its workforce development system.
- (2) Goals. Describe the goals for achieving this vision based on the analysis in (a) above of the State's economic conditions, workforce, and workforce development activities. This must include—
 - (A) Include goals for preparing an educated and skilled workforce, including preparing youth and individuals with barriers to employment³ and other populations.⁴
 - (B) Include goals for meeting the skilled workforce needs of employers.
- (3) Performance Goals. Using the table provided in *Appendix 1*, include the State's expected levels of performance relating to the performance accountability measures based on primary indicators of performance described in section 116(b)(2)(A) of WIOA. (This Strategic Planning element only applies to core programs.)
- (4) Assessment. Describe how the State will assess the overall effectiveness of the workforce investment system in the State in relation to the strategic vision and goals stated above in sections (b)(1), (2), and (3) and how it will use the results of this assessment and other feedback to make continuous or quality improvements.

(a) The *Unified or Combined State Plan* must include the State's strategies to achieve its strategic vision and goals. These strategies must take into account the State's economic, workforce, and workforce development, education and training activities and analysis provided in Section (a) above. Include discussion of specific strategies to address the needs of populations provided *Section (a)*.

- (1) Describe the strategies the State will implement, including industry or sector partnerships related to in-demand industry sectors and occupations and career pathways, as required by *WIOA section 101(d)(3)(B), (D)*. "Career pathway" is defined at *WIOA section 3(7)*. "In-demand industry sector or occupation" is defined at *WIOA section 3(23)*.
- (2) Describe the strategies the State will use to align the core programs, any *Combined State Plan* partner programs included in this *Plan*, mandatory and optional One-Stop partner programs, and any other resources available to the State to achieve fully integrated customer services consistent with the strategic vision and goals described

³ Individuals with barriers to employment include displaced homemakers; low-income individuals; Indians, Alaska Natives, and Native Hawaiians;

individuals with disabilities, including youth who are individuals with disabilities; older individuals; ex-offenders; homeless individuals, or homeless children and youths; youth who are in or have aged out of the foster care system; individuals who are English- language learners, individuals who have low levels of literacy, and individuals facing substantial cultural barriers; eligible migrant and seasonal farmworkers (as defined at *section 167(i)* of *WIOA and Training and Employment Guidance Letter No. 35-14*); individuals within 2 years of exhausting lifetime eligibility under the Temporary Assistance for Needy Families Program; single parents (including single pregnant women); and long-term unemployed individuals.

⁴ Veterans, unemployed workers, and youth and any other populations identified by the State.

above. Also describe strategies to strengthen workforce development activities in regard to weaknesses identified in *section II(a)(2)*

TWO YEAR UPDATE

Massachusetts continues to work to advance its vision and mission statements working to implement the *Massachusetts Workforce Agenda: Meeting the Moment to Attract, Retain, and Develop a Future Workforce* consistent with the pillars outlined in *America's Talent Strategy: Building the Workforce for the Golden Age*. This includes a renewed focus on registered apprenticeship, working to strengthen the Massachusetts talent pipeline to meet both current and future demand, pursuing federal infrastructure funding and advancing state capital projects. Expanding apprenticeship, improving outreach, and supporting entry-level training will help the Commonwealth maintain its competitiveness, meet workforce demand, and ensure that more residents can benefit from the economic opportunities created by these investments. Massachusetts also continues to lead in adoption and implementation of AI (*Plan (Team MA: Leading Future Generations)*, mass.gov/doc/economic-development-plan/)

Vision and Mission Statement

The MassHire State Workforce Board is comprised of members appointed by the Governor and representing business, labor, academia, and community and workforce partners across the Commonwealth. The MassHire State Workforce Board advises the Governor on building an effective workforce system. In the development of ***Massachusetts' Workforce Agenda: Meeting the Moment to Attract, Retain, and Develop a Future Workforce***, the Board established a vision and mission statement to guide the work and remain accountable to the details outlined in the plan.

Vision Statement prepared by the MassHire State Workforce Board

To be a collaborative workforce system that prepares a skilled workforce that employers need, promotes access to good jobs, and creates an equitable and inclusive economy.

Mission Statement prepared by the MassHire State Workforce Board

The Massachusetts workforce system strives to reduce barriers to employment, increase labor market participation, and supports and develops programs to deliver good jobs, skilled workers to meet industry demands, and an equitable and inclusive economy statewide and in regions across the Commonwealth.

Stakeholder Engagement

The Healey-Driscoll Administration and MassHire State Workforce Board engaged with internal and external partners across Massachusetts. Beginning in the spring of 2023, engagement helped to form the foundation for the Vision and Mission, goals, and strategies outlined in the workforce agenda and *WIOA State Plan*.

Building on Massachusetts' *WIOA State Plan* partners, stakeholders spanned multiple organizations to incorporate feedback that ultimately shaped strategies to attract, retain, and develop talent in Massachusetts while also strengthening the state's workforce infrastructure systems.

WIOA State Partners Advisory Committee (SPAC):

- Executive Office of Labor and Workforce Development (EOLWD)
- MassHire Department of Career Services (MDCS)
- EOLWD Multilingual Services
- Department of Unemployment Assistance (DUA)
- MDCS Jobs for Veterans State Grant Director
- Executive Office of Veterans Services
- Executive Office of Education (EOE)
- Department of Elementary and Secondary Education's (DESE) Adult Education
- Commonwealth Corporation
- Executive Office of Public Safety and Security (EOPSS)
- Department of Corrections (DOC)
- Executive Office of Health and Human Services (EOHHS)
- Department of Transitional Assistance (DTA)
- Massachusetts Rehabilitation Commission (pending name change to MassAbility)
- Massachusetts Commission for the Blind (MCB)
- Executive Office of Elder Affairs (EOEA)

Workforce Skills Cabinet:

- Executive Office of Labor and Workforce Development
- Executive Office of Education
- Executive Office of Economic Development
- Executive Office of Health and Human Services

MassTalent (Industry Focused):

- Executive Office of Labor and Workforce Development
- Executive Office of Education
- Executive Office of Economic Development
- Executive Office of Health and Human Services

- Executive Office of Energy and Environmental Affairs
- Governor's Office of Climate Innovation and Resilience
- Massachusetts Clean Energy Center
- Commonwealth Corporation
- Massachusetts Life Sciences Center
- Massachusetts Technology Collaborative

Regional Workforce Partners:

As part of the Workforce Skills Cabinet, seven regional sessions were convened in the fall of 2023 bringing together over 200 attendees who represented workforce development, academia, business, labor, and elected officials. Regions included:

- Berkshire
- Pioneer Valley
- Central Mass
- Northeast
- Greater Boston
- Southeast
- Cape Cod and Islands

Curated Conversations:

- Labor and Registered Apprenticeship Pathways and Pipelines, hosted by AFL-CIO
- Youth Employment, hosted by Massachusetts Workforce Association
- DEI in the Workplace, hosted by The Partnership
- Caregiving in the Workplace, hosted by the Massachusetts Business Roundtable
- Partnerships with Community Colleges, hosted by Massachusetts Association of Community Colleges
- Partnerships with Chambers of Commerce, hosted by Massachusetts Chambers of Commerce Policy Network

Policy Papers and Recommendations:

- [*Recommendations of the Climate Chief*](#) (Governor's Office of Climate Innovation and Resiliency) mass.gov/info-details/recommendations-of-the-climate-chief#read-the-full-report-
- [*TeamMA: Leading Future Generations – Economic Development Plan*](#) (Executive Office of Economic Development) mass.gov/doc/economic-development-plan/
- [*Tapping Untapped Talent: How Foreign-Educated Immigrants Can Strengthen the Massachusetts Economy*](#) (MA Business Roundtable and Tufts University Center for State

Policy Analysis) maroundtable.com/wp-content/uploads/2023/10/MBR_TappingUntappedTalent.pdf

- [Equitably Addressing the Workforce Crisis in MA: How to Capitalize on Minority-Serving Institutions](https://maroundtable.com/wp-content/uploads/2023/11/CapitalizeMSIs_MTFreport.pdf) (MA Taxpayers Foundation and MA Business Roundtable) maroundtable.com/wp-content/uploads/2023/11/CapitalizeMSIs_MTFreport.pdf
- [Lifting our Communities: Building Education Pathways to Economic Opportunity for All](https://mbae.org/lifting-our-communities-building-education-pathways-to-economic-opportunity-for-all/) (MA Business Alliance for Education) mbae.org/lifting-our-communities-building-education-pathways-to-economic-opportunity-for-all/
- Among others!

The Healey-Driscoll Administration also supported a public comment period through virtual, open discussions from late January to early February of 2024 to finalize the workforce agenda and *WIOA State Plan*.

Detailed Strategies

Increasing access and opportunity for Massachusetts residents and new arrivals is critical in attracting, retaining, and developing the talent industry and employers need today and for the Commonwealth's future. Massachusetts can meet this moment by building on a collaborative workforce system to leverage key goals and strategies outlined in ***Massachusetts' Workforce Agenda***. In turn, these partnerships and strategies will further position Massachusetts to unlock greater equity, create pathways and skill building to meet demands, and ensure Massachusetts' workers and rising talent are positioned for success and skilled to fill the thousands of jobs available today and projected for the future.

Goals and strategies are outlined in four focus areas including 1) Talent Attraction and Retention, 2) Talent Development, and 3) Lead by Example and 4) Workforce System Infrastructure.

I. **Talent Attraction and Retention**

Massachusetts must reduce barriers to both employment and hiring to increase labor market participation and foster a more equitable workforce to drive talent attraction and retention for both jobseekers and employers across the Commonwealth.

Key Strategies:

1. **Strengthen work supports:** Launch a stipend initiative for low-income participants in sector pathway models to incentivize enrollment, completion and employment and reduce barriers to training and employment (such as costs for caregiving, transportation, digital access, and equipment, and more).

2. **Increase access to transportation to work:** Connect jobseekers and workers via MassHire career centers to local transportation or limited WIOA subsidies for transportation to work.
3. **Reduce the cliff effect:** Implement a statewide project to address cliff effects, initiating first with a pilot to reform benefit disincentives and provide economic mobility for participants.
4. **Subsidize housing costs:** Refer job seekers accessing MassHire career centers to local housing assistance organizations. Additionally, provide support for individuals in shelter to gain employment as a catalyst to exit shelter.
5. **Increase worker retention:** Promote the Workforce Training Fund for eligible employers to reskill or upskill incumbent workers and as a hiring and retention strategy. For employers who may not be eligible to access grants from the Workforce Training Fund Program, explore other grant programs through the Workforce Competitiveness Trust Fund to support reskilling or upskilling incumbent workers.
6. **Promote ESOL for Work:** Leverage Workforce Training Fund Program grants for employers to increase use for ESOL training among incumbent workers and as a hiring and retention strategy.
7. **Incorporate a Whole-of-Government Approach to Caregiving:** Work collaboratively across government including EOLWD, Executive Office of Education, and Executive Office of Economic Development among other agencies to take a whole-of-government approach to ensuring affordable, high-quality childcare in Massachusetts. Additionally, EOLWD will partner with the Massachusetts Caregivers Coalition with a renewed focus on increasing awareness of childcare, senior care, and other caregiving resources in the workplace.

II. Talent Development

Massachusetts has an opportunity to strengthen and scale effective strategies, programming, and resources to develop untapped talent and meet the hiring needs of employers. By focusing on talent development, Massachusetts is positioned to lead with this strategy with defined approaches to:

1. Support Priority Populations
2. Promote Targeted, High Growth Industries and Employer Needs
3. Address AI and the Future of Work

1. Support Priority Populations

As part of a talent development strategy, Massachusetts needs to create programming and pathways to move people off the sidelines and into the labor market. This approach should especially consider priority populations including discouraged, underemployed, and unemployed residents as well as disconnected individuals from the state's labor market.

Key Strategies:

1. **Youth:** Support, scale, and align state programming for youth through greater coordination across WIOA Youth services, the Connecting Activities program, and the Youthworks program to scale youth employment and supports.

The Youthworks program expanded rapidly post-COVID, providing employment for participants between 14 years old and 25 years old who identify as lesbian, gay, bisexual, transgender, queer and/or questioning, youth of color, youth of all abilities, national origins, religions, low-income youth, including single income households, and youth experiencing housing insecurity.

To address the changing funding landscape for YouthWorks, EOLWD will work with partners to:

- Sync Work-Based Learning Plan and Signal Success curriculum
 - Coordinate business outreach across YouthWorks, Connecting Activities, and STEM
 - Establish a single state website for employers and youth for internships
 - Partner to support education's "Reimagine High Schools" campaign to strengthen K-12 opportunities that integrate work and learning
2. **Immigrants and New Arrivals:** Support immigration employment opportunities among immigrants and new arrivals by working collaboratively with partners to:
 - Increase resources for contextualized ESOL and work readiness
 - Create a Statewide Re-credentialing Center for immigrants with degrees, licensing, or industry certificates from home countries
 - Create statewide support for foreign-born post-secondary student retention as called out in the Administration's Economic Development Plan
 - Enhance shelter response (including but not limited to MassHire's partnership with shelter providers) to increase employment placements for shelter residents
 3. **Different Abilities:** Align Massachusetts Rehabilitation Commission job training funds and Massachusetts Commission for the Blind (MCB) clients with existing sector strategies managed by Commonwealth Corporation for the Workforce Competitiveness Trust Fund. This collaborative approach will create a strong pipeline of talent among individuals with disabilities. In doing so, partners will:
 - Work with Commonwealth Corporation to scale-up effective sector strategy models that successfully engage and boost employment for people with disabilities
 - Expand existing MassHire Department of Career Services and MA Rehabilitation Commission training partnerships (with funding provided by MA Rehabilitation Commission and contracted to MassHire) and align efforts to targeted industries and occupations
 - Expand MassHire and Massachusetts Commission for the Blind partnerships to scale employment resources for blind consumers.

4. **Low-Income Workers:** Provide work opportunities and training to TANF and SNAP clients (Department of Transitional Assistance clients) through the MassHire Work Participation program, leveraging funding from the Department of Transitional Assistance to MassHire.
5. **Older Workers:** Partner between MassHire and the Executive Office of Elder Affairs to create an employer messaging campaign to educate employers about the benefits of hiring older workers. Additionally, partner with MassHire to identify employment positions for older workers.
6. **Formerly Incarcerated Individuals:** Partner with the Executive Office of Public Safety and Security, Department of Corrections and House of Corrections, and the Executive Office of Labor and Workforce Development to align state funded programs and build a statewide strategy to achieve employment goals.
7. **Veterans:** Launch an employment campaign for Veterans and build on the vision established by the newly created cabinet-level secretariat for the Executive Office of Veterans Services and ongoing work between MassHire and Massachusetts cities and towns.

2. Promote Targeted, High-Growth Industries and Employer Needs

Massachusetts has a tremendous opportunity to strengthen and scale effective strategies, programming, and resources to connect untapped talent to meet the needs of industry and employers statewide and in regions across the Commonwealth.

Key Strategies:

1. **Regional Workforce Skills Teams:** Support seven regional Workforce Skills Cabinet Teams led by regional workforce boards, economic development, education, and employers to analyze and prioritize industries and occupations to build talent development strategies meet the needs of employers. By creating the third iteration of regional blueprints, each regional Workforce Skills Cabinet Team will drive collaboration and greater outcomes for workforce training and employment outcomes especially in prioritized industries and occupations. The seven regional teams serve as the foundation for regions to identify and track regional needs and develop intentional programming in partnership with local employers. As of February 2024, the priority industries by region include:

Regional Workforce Skills Cabinet Team	Top 2-3 Priority Industries	Top Occupations

Berkshires	1. Health Care and Social Assistance 2. Manufacturing and Engineering 3. Hospitality, Culinary and Management	1. Health Care and Social Assistance: Home health and personal care aides, nursing assistants and RNs 2. Manufacturing and Engineering: Inspectors, testers, sorters, samplers and weighers and industrial engineers 3. Hospitality, Culinary and Management: Fast food and counterworkers, waiters and waitresses, restaurant cooks and general and operations managers
Pioneer Valley	1. Health Care and Social Assistance 2. Advanced Manufacturing 3. Educational Services	1. Health Care and Social Assistance: Medical Assistant, Emergency Medical Technician, Nursing Assistant, Social and Human Service Assistants (Behavioral Health), Clinical Laboratory Technicians (Varied) (Registered Apprenticeships), Patient Care Technician 2. Advanced Manufacturing: Production Worker-Computer Numerical Control (CNC), Operator Production Worker- Machinist (Including Computer Numerical Control Machinist), Inspectors, Testers, Quality Control Front Line Manufacturing Production Supervisors 3. Educational Services: Teacher Assistants/Paraprofessionals, Childcare Workers –Infant → Pre-K
Central	1. Health Care and Social Assistance 2. Manufacturing 3. Transportation, Warehousing and Logistics	1. Health Occupations: CNA, LPN, RN, Pharmacy Tech and Direct Care Worker 2. Manufacturing: CNC Machinist, Quality Control Tech and Production Worker 3. Transportation, Warehousing and Logistics: Commercial Drivers and Diesel Techs

Northeast	1. Advanced Manufacturing 2. Health Care & Social Assistance 3. Professional, Scientific, & Technical/IT	1. Advanced Manufacturing: Supervisory Assemblers/Production Workers/Machinists Inspectors/Testers/Quality Control 2. Health Care & Social Assistance: Health Care Practitioners and Technicians Direct Care and Support Health care Administration 3. Professional, Scientific, & Technical/IT: Computer-related and IT Support, Engineering and Engineering Technicians
Greater Boston	1. Professional and Technical Services 2. Health care and Social Assistance	1. Professional and Technical Services: Computer and Information Analysts, Software Developers and Programmers, Database Administrators and Network Architects, Computer Support Specialists 2. Health Care and Social Assistance: Registered Nurses, Health Technologists and Technicians, Nursing, Psychiatric, and Home Health Aides, Counselors, Social Workers, and other social services specialists
Southeast	1. Health Care and Social Services 2. Professional and Technical Services 3. Finance and Insurance	1. Health care and Social Services: Certified Nursing Assistant, Radiologic Technicians, Dental Hygienists/Assistants, Health Info Techs, Clinical Support Jobs 2. Professional and Technical Services: Computer User Support Specialist, Systems Analyst, Network Administrators 3. Finance and Insurance: Customer Service Representative, Relationship/Universal Bankers

Cape & Islands	1. Health Care 2. Construction & Extraction Occupations 3. Accommodation & Food Service	1. Health Care: Registered Nurses, Emergency Medical Technicians & Paramedic, Medical Assistant, Home Health & Personnel Care Aides & Nursing Assistants, Licensed Practical Nurse, Community Health Worker 2. Construction & Extraction Occupations: Electricians, Carpenters, HVAC, Construction Managers, Wind Energy Development Managers 3. Accommodation & Food Service: Food Service Manager, Chefs and Head Cooks

2. **MassTalent – High Growth, Targeted Industries:** Align existing resources for sector programs through a cross-secretariat strategy to maximize training for individuals in high growth, targeted industries and meet the needs of employers representing:
- Advanced Manufacturing
 - Health Care and Human Services
 - Life Sciences
 - Clean energy

Industry Spotlight: Health Care and Human Services

Massachusetts has been experiencing disruption in health care and human service delivery at unprecedented levels since the COVID-19 pandemic. Workforce issues that existed before the pandemic have only become more exacerbated, impacting talent attraction and retention plus patient care across the Commonwealth. Health care is the largest employment sector in Massachusetts, employing 477,704 workers; the human services sector employs 160,000 workers.

The Executive Office of Health and Human Services through its partnership with the Workforce Skills Cabinet has identified three priority role groups to advance in cross-agency collaboration: behavioral health (mental health and substance use disorder), nursing, and direct care. These three role groups comprise 65% of the Commonwealth's health care workforce and are the foundation of service delivery in the Commonwealth.

Key Strategy:

Through the Workforce Skills Cabinet and led by the Executive Office of Health and Human Services, the Healey-Driscoll Administration is executing a comprehensive, cross-agency plan to evaluate investments to attract, retain, and develop health care and human service talent, develop great pathway programs to build the talent pipeline, remove policy barriers that hinder effectiveness within government, and implement and monitor outcomes. Specifically, the plan will:

- Evaluate investments in retention efforts of nursing, behavioral health, and direct care workers by monitoring the work commitments of 3,000 workers that have received \$150 million in student loans forgiven in exchange for service commitments to remain within the Commonwealth.
- Implement future student loan programs and evaluate outcomes.
- Evaluate the nursing workforce investments through high school career pathways, free tuition to community college and state schools, and policy work to help academic institutions and providers to expand training capacity.
- Evaluate workforce development grants in nursing, direct care, and behavioral health and monitor the recruitment, retention, training, and pipeline outcomes.
- Develop a direct care career pathway that expands the pool of direct care workers but also creates advancement opportunities.
- Streamline internal state policy, regulations, or processes that creates barriers and/or delays for workers seeking to become licensed or certified.
- Implement and monitor behavioral health early career initiatives including scholarships, paid training, paid supervision, paid licensing, and testing fees.
- Publish comprehensive workforce supply and demand data across healthcare and human service sectors and conducting this research on a bi-annual basis.

Moreover, each of the seven regional Workforce Skills Cabinet Teams has identified health care and human services among top industries to work collaboratively as a region. In doing so, the Healey-Driscoll Administration looks forward to engaging with each region including employers, non-profits, labor, academia, and more to work collaboratively in building diverse talent pipelines and creating meaningful career pathways to help fulfill the demands in each region. The regions include: Berkshires, Pioneer Valley, Central, Greater Boston, Northeast, Southeast, and Cape & Islands.

Finally, the Workforce Skills Cabinet with the leadership of Health and Human Services is launching a working group comprised of representatives from the provider, payer, labor, and government communities to work collaboratively in achieving the abovementioned.

Industry Spotlight: Climate and Clean Energy

Massachusetts must build the workforce needed to make communities more resilient and power a just clean energy transition that provides robust and inclusive economic opportunities

both to existing workers and potential new entrants. The Massachusetts clean energy workforce will need to grow by an additional 29,700 full-time equivalent workers to meet the Commonwealth's 2030 greenhouse gas emissions reduction mandates. This projected growth will require about 38,000 workers to be trained and ready to deploy some or all their time on climate-critical work. Across all clean energy sectors, over 140 occupations will see job increases, and 20 of these occupations will account for 65 percent of jobs added in Massachusetts. To illustrate, the offshore wind industry, alone, is projected to grow in Massachusetts by 724 percent by 2030.

Key Strategy:

- Develop a comprehensive, cross-agency plan, as identified in the report: [Recommendations of the Climate Chief. mass.gov/info-details/recommendations-of-the-climate-chief](https://www.mass.gov/info-details/recommendations-of-the-climate-chief) This plan should include measurable targets and goals to build a clean energy, climate, and resilience workforce.
- Leverage stakeholder engagement for the plan formation. Among stakeholder should include the Massachusetts Clean Energy Center with the Workforce Skills Cabinet, chaired by the Executive Office of Labor and Workforce Development, with input from state agencies including the Executive Office of Energy and Environmental Affairs, the Governor's Office of Climate Innovation and Resilience, MassDOT, the Executive Office of Veterans Services, the Executive Office of Public Safety and Security, and the Governor's Federal Funding and Infrastructure Office. Moreover, external stakeholder engagement will also be valuable in the development process including but not limited to labor, MassHire regional workforce boards and career centers, vocational high schools, community colleges and private two-year institutions, employers, environmental justice organizations, and more.

Industry Spotlight: Microelectronics and Semiconductors

Massachusetts has a unique opportunity to be a leader in the advanced manufacturing and microelectronics industry following the national priorities of re-shoring production and the creation of the next generation of microelectronics. As noted previously, Massachusetts ranked seventh in the nation with 65 semiconductor establishments employing 14,458 workers.

Through the CHIPS and Science Act, the federal government is committing significant funding to domestic production of microelectronics to support national and economic security. The selection of the Massachusetts Technology Collaborative to lead the Northeast Microelectronics Coalition (NEMC) Hub by the Department of Defense as one of eight regional Microelectronics Commons Hubs is a significant part of this. With the selection, the NEMC Hub received \$19.67 million (Year 1) to further develop membership and infrastructure, commercialize technologies, and support education and workforce initiatives related to this industry for the Northeast region. The projected growth of this industry furthered by federal

priorities results in a greater demand for a talented and well-trained workforce here within the Commonwealth. 90 NEMC Hub Member organizations are based in Massachusetts.

Massachusetts has the opportunity to lead nationally in microelectronics. To do so, the Commonwealth must develop, attract, and train the next generation of microelectronics workers from technicians to PhDs, and reskill or upskill incumbent workers on new technologies and processes.

Key Strategy:

- Leverage stakeholder engagement to develop a Statewide Microelectronics workforce development strategy. The following stakeholders will include the Northeast Microelectronics Coalition Hub, Center for Advanced Manufacturing at Mass Tech, the Workforce Skills Cabinet with input from the Executive Office of Education, the Executive Office of Labor and Workforce Development, and the Executive Office of Veterans Services, and the Governor's Federal Funding and Infrastructure Office.
- Develop coordinated approach to workforce development by working across agencies, leveraging the MassHire workforce development boards, career technical education, Career Technical Initiative, and community colleges to provide targeted training tied specifically to emerging industry needs.
- Evaluate current training programs and strategy for the Advanced Manufacturing talent pipeline development to ensure alignment and ability to build upon its successes.
- Evaluate current and forthcoming federal microelectronics education and workforce development funding opportunities and develop strategies as applicable.

See also Focus Area #4: System Infrastructure for more strategies related to MassTalent.

3. **Apprenticeship Pipelines:** Align registered apprenticeship pipelines to industry priorities and projected demands. This strategy is multi-pronged including a focus on diversity, equity, inclusion, and accessibility within construction trades, and also expansion of registered apprenticeship in new industries.

DEIA in Construction Pipelines: Increase representation in the construction trades by leveraging registered apprenticeship. The construction industry projects severe labor shortages due to an aging workforce and early retirement levels in the industry. The average construction worker is now in their late 40's. At the same time, Massachusetts continues to pursue significant federal funding for major projects in building climate resiliency and infrastructure in regions across Massachusetts.

Recognizing this and building on MGL Chapter 149, Massachusetts should increase underrepresented populations in construction by encouraging effective programs including registered apprenticeship to create more pathways for women and people of color in the construction and building trades. For Massachusetts to maintain its competitiveness, it will be imperative to **promote diversity, equity, and inclusion goals and strategies to reach these goals for major state-level construction projects** as Massachusetts continues to pursue significant federal funding for major infrastructure projects and as Massachusetts moves forward on key state-level capital improvement projects.

Additionally, Massachusetts should focus on increasing awareness among young people at an early age to improve exposure for innovative, high-demand careers in construction as Massachusetts plans for its future infrastructure.

Diversify RA Industries: Expand Registered Apprenticeship to growing industries in Massachusetts such as health care, advanced manufacturing, tech, financial services, biotech, and more to align registered apprenticeship to in-demand occupations in such fields. Expanded Registered Apprenticeship can be leveraged by:

- Utilizing state and federal funding for Registered Apprenticeship and technical assistance to grow best practices models in high growth industries across the state through intermediary models and business growth.
 - Utilizing the state Registered Apprenticeship Tax Credit, now available to even more industries (at the discretion of the Executive Office of Labor and Workforce Development).
4. **MassReconnect:** Expand two-year post-secondary pipeline through the state’s newly established MassReconnect program. MassReconnect offers Massachusetts residents ages 25 years and older, without a college degree or credential, to access free tuition at the 15 community colleges across the state. By leveraging MassReconnect as a workforce tool, a robust talent pipeline can be developed. This strategy should connect MassReconnect with workforce partners to:
- Educate and train a diverse population, increasing awareness while in school to the range of industries and workforce opportunities
 - Connect graduated individuals to high-demand occupations
 - Connect MassHire and the 15 community colleges through a partnership that will enhance recruitment for MassReconnect enrollment and employment outcomes

3. Address AI and the Future of Work

Align workforce strategies with the state’s Economic Development Plan’s focus on artificial intelligence (AI).

Key Strategy:

1. **AI Advisory Council:** As expressed in the [2023 Massachusetts Economic Development Plan \(Team MA: Leading Future Generations\)](#), mass.gov/doc/economic-development-

[plan/](#) the Healey-Driscoll Administration emphasizes the need for Massachusetts to lengthen its lead, nationally and globally, across high growth industries including the adoption and implementation of AI.

Massachusetts is a leader in the creation of AI companies and development in the industry. To support Massachusetts' workforce, the Commonwealth must look ahead and address the impact of AI and the resulting "skill shift" of jobs in the state's economy, ranging from job loss due to automation to upskilling workers to new jobs created by AI impact. The state's workforce system should focus on this element of the future of work by:

- Incorporating a workforce perspective in the **AI Advisory Council**. The Healey-Driscoll Administration launched in late February 2024 an AI Advisory Council to be co-chaired by the secretaries of Economic Development and Technology Services and Security tasked with creating recommendations for how the state can best support both early-stage companies and incumbent employers. The Council should consider state-based policies around AI in accordance with new federal guidance to fully develop Massachusetts guidance on how AI will impact workers and ensure this technology is in support of critical and analytical thinking.
- **Talent Impact:** In an advisory capacity, the Council should incorporate strategies for how AI will impact the workforce in Massachusetts and what collaborative solutions can support workers are not left behind, but rather, upskilled as technology advances.

III. **Lead by Example**

Massachusetts is positioned to strengthen and scale effective strategies, programming, and resources to develop untapped talent especially with the Governor and Executive Branch leading by example and the Commonwealth as the largest employer in Massachusetts.

Key Strategy:

The Healey-Driscoll Administration will launch a Lead by Example strategy managed by the Human Resources Division (HRD) to train and hire diverse populations including individuals with disabilities, veterans, and people of color. In doing so, HRD will leverage existing relationships with key state agencies and bridge new partnerships to advance this goal. HRD will also scale efforts to encourage self-disclosure among Commonwealth employees.

As part of this Lead by Example strategy, the Governor (with support by the Executive Office of Labor and Workforce Development and HRD) will:

1. **Promote skills-based employment practices across state government that prioritize skills and experience over educational background**, ensuring that unnecessary educational requirements are not included in minimum entrance requirements or job postings.

2. **Build upon hiring strategies to pursue employment opportunities for veterans and individuals with disabilities** through newly created partnerships with non-profit organizations and internal agencies like EOVS and Massachusetts Rehabilitation Commission (MRC).
3. **Consider a campaign to encourage private sector employers to train and hire diverse, untapped talent** especially focused on individuals with disabilities, veterans, and people of color.
4. **Implement Administration's equity assessment** to address persistent inequities in the labor market and create opportunities that are inclusive, fair, and representative of the diversity of our Commonwealth.

IV. **Workforce System Infrastructure**

In a post-COVID environment, Massachusetts needs to modernize and strengthen the infrastructure and coordination across the MassHire public workforce system to improve support for jobseekers and employers.

Key Strategies:

1. **Modernize and strengthen the infrastructure and coordination across the MassHire public workforce system:** The Healey-Driscoll Administration should identify capital budget resources to support the replacement of MOSES—the MassHire database—followed by securing a contractor through a competitive RFP process to:
 - Realign MassHire service delivery to hybrid model
 - Redesign the online presence of MassHire based on user centered design principles that follow an individual from "job loss to job gain" aligned to MassHire services for companies through a new, accessible single "front door" for employers
 - Connect systems between state agencies
2. **Improve "front door" experience for both jobseekers and employers:** As part of MassTalent, it is imperative for the Massachusetts workforce system to ensure both jobseekers and employers can navigate, with ease, the range of resources by industry and occupation. Aligning and improving the "front door" experience, building on MassHire and incorporating resources across state agencies, will be a cross-secretariat effort including improved online resources (via mass.gov/masstalent) and a shared MassTalent marketing campaign.
3. **Increase engagement of the MassHire State Workforce Board:** In addition to the Massachusetts State Workforce Board serving as a convening body to influence and support the State WIOA Plan, the Board also serves as a resource for EOLWD to engage regional workforce partners to advance recommendations of the State WIOA

Plan and Governor’s workforce agenda. Among strategies, a more engaged board can help to:

- Identify priorities shared across all 16 regional workforce boards for quarterly centralized reporting via the Department of Career Services and shared with the MassHire State Workforce Board
- Serve as a vehicle for EOLWD to collaborate with regional workforce partners
- Re-establish subcommittees and identify working groups of the MassHire State Workforce Board reflective of *State Plan* strategies

Assessment, Metrics, and Impact

The outcomes for the goals and strategies included in the *State Plan* will be measured by a combination of federally-required performance measures (*WIOA Common Measures*) and state-designed metrics to generate data for understanding the impact of public workforce programming across the state.

The federal WIOA Common Measures focus on entered employment rates, retention rates, wages, skill gain, and employer measures for all MassHire customers and partner programs. The federal measures and benchmarks are described in detail in the *Massachusetts WIOA State Plan*.

The Healey-Driscoll Administration, MassHire State Workforce Board, and the Executive Office of Labor and Workforce Development will design state-based metrics for new strategies articulated in the *Massachusetts WIOA State Plan* that reflect current and emerging priorities such as immigration programming, scaling registered apprenticeship, building training pathways for specific sectors, and other work.

The MassHire State Workforce Board will work with the Executive Office of Labor and Workforce Development to provide public-facing reports and dashboards to monitor the success of the ideas and strategies outlined in the *Massachusetts WIOA State Plan*.

To review the full *Massachusetts Workforce Innovation and Opportunity Act (WIOA) State Plan*, visit: [Massachusetts WIOA State Plan Landing Page mass.gov/massachusetts-wioa-state-plan-and-workforce-area-plans](https://mass.gov/massachusetts-wioa-state-plan-and-workforce-area-plans) to view the *State Plan* and information on the public comment period.

Using the table provided in *Appendix 1*, include the State’s expected levels of performance relating to the performance accountability measures based on primary indicators of performance described in *section 116(b)(2)(A)* of WIOA. (This Strategic Planning element only applies to WIOA Core programs.)

WIOA Statewide Metrics – Appendix 1 WIOA Performance Metrics

TWO YEAR UPDATE

[See program-specific state plan requirements for core programs.](#)

Along with developing specific goals, strategies, and tactics the collective workforce system will pursue in this *State Plan*, the Commonwealth identified statewide metrics to track progress and success of achieving the goals. The tables below outline these statewide metrics for each goal. Early *State Plan* implementation efforts will focus on identifying the methodology for capturing these systemwide metrics, as well as benchmarks and targets toward achieving the goal. (See *Attachment C* for a definition of these state-driven metrics.)

1. **Adult Job Seekers:** Expand the capacity of the workforce system to accelerate employment especially for those with challenges to employment (priority populations)

Priority Populations include the following: low income, low skilled, persons with Limited English Proficiency, people with disabilities, older workers, formerly incarcerated individuals, racial/ethnic minorities, Veterans, and unemployment claimants.

Figure 45: Statewide Metrics:

All Job Seekers	Priority Populations
Shared Customers Across Partners	Entered Employment
Entered Employment	Credential Attainment
Employment Retention	Educational Advancement
Credential Attainment	Career/wage “pathway”
Educational Advancement	
Customer diversity	

2. **Youth and Young Adults:** Improve career mobility and unsubsidized employment outcomes for youth (aged 16-24).

Figure 46: Youth Metrics

Youth and Young Adults
Educational Advancement
Youth diversity
Credential Attainment
Entered Employment
Career/wage “pathway”
Shared Youth Customers Across Target Programs and Partners
Percent of Youth Cohort in Apprenticeship and Work-Based Learning Programs

- I. **Business:** Support business growth and sustainability by elevating workforce services and developing diverse talent pipelines for business.

Figure 47: Business Metrics

Business
Number of Businesses Served
Number of Repeat Businesses
Number of Businesses by Industry/Region
Number of Referred Applicants Hired
Number of Businesses Sponsoring Apprenticeship or Work-Based Learning Programs
Business Customer Satisfaction

Refer to Appendix 1 for expected levels of performance based on primary indicators of performance. The federal indicators of performance focus on employment outcomes in the second and fourth quarter after exit, median earnings in the second quarter after exit, credential attainment, measurable skill gains for job seekers and adult education participants, and effectiveness in serving employers. All partner agency federally funded programs are measured in the same way and a penalty could be applied to WIOA discretionary funds for repeated missed performance targets. This creates a shared accountability for shared customers and their outcomes.

III. OPERATIONAL PLANNING ELEMENTS

(a) State Strategy Implementation

TWO YEAR UPDATE

Assistant Secretary for Workforce Innovation, Matthew Hartman, serves as the Executive Director of the 35-member State Workforce Development Board. The Board continues to prioritize performance, policy, data-driven decision-making, youth and young adult pathways, and supporting the implementation of the Massachusetts Workforce Agenda, which includes the MassHire Innovation Project.

(1) State Board Functions. Describe how the State board will implement its functions under section 101(d) of WIOA (i.e., provide a description of Board operational structures and decision-making processes to ensure such functions are carried out).

The Healey-Driscoll administration utilized WIOA implementation as an opportunity to reconstruct and reinvigorate the state workforce board. The state legislation establishing the new Board (M.G.L. Ch. 23H, §7) was enacted on December 2, 2015 and imbued the Board with carrying out the responsibilities required of WIOA; providing assessments and

recommendations to the Governor, the Workforce Skills Cabinet, MassHire Workforce Boards, and other entities as needed regarding the effectiveness of the public workforce development system in the Commonwealth; and promoting innovative and performance-driven models for workforce development. This legislation transformed the previous Massachusetts Workforce Investment Board (MWIB) from a 65-member board to a leaner 33-member Massachusetts Workforce Development Board (MWDB) to serve as the primary vehicle to provide the policy and operational framework for the state public workforce system. In August 2018, as part of the workforce system's adoption of the unifying "MassHire" brand, the state board was renamed to the "MassHire State Workforce Board".

Functionally, the Board sits within the Executive Office of Labor and Workforce Development (EOLWD). The Board is staffed by an Executive Director, in close coordination with staff of EOLWD and MassHire Department of Career Services (MDCS). Senior leadership of the Board is comprised of the Governor-Appointed Board Chair (currently Joanne Pokaski) Secretary of Labor and Workforce Development (currently Secretary Lauren Jones), and the Board's Executive Director (currently Darien Johnson.) Board senior leadership make high-level decisions such as the Board's scope and deliverables, meeting agendas, Board Committee membership and leadership, and other items related to Board governance.

The Board meets quarterly. During these meetings the Board is updated on and discusses high-level strategic priorities that foster continuous improvement of the workforce system, as well as considers activities and recommendations from one of the Board's committees. There are currently four committees of the Board:

MassHire Performance Committee: captures system-level performance data to drive decision-making and strategy; identifies and pursues opportunities to boost MassHire system performance, and provides general oversight of the MassHire system, including policies, programming, and development of the *WIOA State Plan*.

Workforce Intelligence Committee: supports the development of labor market information to stakeholders; drives MassHire toward using common and consistent labor market data; distills labor market information to support the MassHire State Workforce Board.

Adult Pathways Committee: supports the integration of statewide workforce-related resources, programs, and initiatives to enhance career and economic outcomes for adult job seeker customers; may be tasked with providing general oversight to MassHire initiatives that improve programs and resources for adult customers, including Apprenticeship Expansion.

Youth Pathways Committee: develops recommendations to enhance integrating programming and career pathways for youth; provides general oversight on the development and implementation of the *WIOA State Plan* youth goal.

Additionally, the state board's enabling legislation authorized the MassHire Department of Career Services (MDCS), the designated State Workforce Agency, to promulgate and carry out workforce policies that are operational in nature, ensuring policy guidance to inform the Massachusetts Workforce Development System's programmatic operations.

(2) Implementation of State Strategy. Describe how the lead State agency with responsibility for the administration of each core program or a *Combined State Plan* partner program included in this plan will implement the State's Strategies identified in II(c) above. This must include a description of—

(A) Core Program Activities to Implement the State's Strategy. Describe the activities the entities carrying out the respective core programs will fund to implement the State's strategies. Also describe how such activities will be aligned across the core programs and *Combined State Plan* partner programs included in this plan and among the entities administering the programs, including using co-enrollment and other strategies.

Massachusetts will achieve its strategic vision and goals through coordinated action across state agencies and partners, ensuring workforce investments are aligned, effective, and centered on jobseekers and employers.

(A) MassHire Workforce System Future State Road Map: MassHire Innovation Project

Massachusetts is embarking on a bold journey to reimagine the entire workforce system, not just to replace old technology, but to build something new: a system designed around people. The purpose is to create a dynamic "front door" to talent—where jobseekers and employers alike can easily access resources, engage with services, and contribute to a thriving economy.

To achieve this, Massachusetts has begun implementing a multi-year modernization of its workforce system designed to strengthen collaboration, improve alignment of talent development with employer needs, expand access to good jobs, and advance an equitable and inclusive economy. The approach is aligned with the national framework articulated in *America's Talent Strategy: Building the Workforce for the Golden Age*, ensuring that system improvements support industry demand, worker mobility, integration, accountability, and innovation.

MassHire's three-prong strategy centered on people, processes, and technology aligns closely with the future of the workforce. The strategy supports the pillar of modernizing education and training systems and creating a more efficient, responsive workforce infrastructure. The focus on improved processes and stronger employer and jobseeker connections reinforces the pillar of building a demand driven workforce system that responds directly to employer needs. Investments in technology and streamlined service delivery advance the pillar of expanding access to good jobs, reducing barriers that prevent individuals from fully participating in the labor market. Finally, by strengthening service coordination and enhancing customer experiences, the strategy supports the pillars of expanding apprenticeships and work-based learning and strengthening partnerships across workforce, education, and industry, ultimately promoting economic vitality across all regions of the Commonwealth.

This transformation includes and builds on extensive engagement across the workforce ecosystem, including MassHire workforce boards, career centers, the MassHire State Workforce Board, jobseekers,

businesses, education partners, and other state partner agencies. Early efforts have established shared ownership of the vision and informed initial implementation steps, including governance design, policy review, performance metric development, and pilot partnerships. Together, these actions reflect an early commitment to accountability and performance improvement, ensuring that modernization efforts are guided by measurable outcomes and continuous improvement as implementation advances.

Integration across programs and partners remains a core priority. Massachusetts will continue strengthening cross agency coordination, aligning policies and workflows, and advancing interoperable technology systems that reduce duplication and create a smoother customer experience. In the next 3 years, this work will support a more unified and connected workforce system—one where job seekers, employers, and staff experience MassHire as a cohesive network delivering consistent, high-quality services across the Commonwealth.

Lastly, accountability is embedded throughout the implementation process. The Commonwealth is strengthening governance structures, key performance indicators, and monitoring mechanisms to ensure that investments are linked to outcomes and aligned with WIOA performance requirements and statewide goals. As implementation continues, these tools will support data-informed decision-making, reinforce performance improvement, and ensure transparency and fiscal stewardship across the system.

Massachusetts will continue to improve its system through updated policies and workforce issuances consistent with federal guidance (TEGL, TEN, etc.) and work to ensure continued alignment across the Five Pillars set forth in America’s Talent Strategy throughout the project.

State Strategies to Implement Industry or Sector Partnerships and Career Pathways

Massachusetts will advance sector partnerships and career pathways by deepening alignment between Perkins V Career and Technical Education (CTE) programs and the workforce development system, ensuring education and training investments are directly responsive to evolving employer demand, regional labor market conditions, and critical talent shortages.

Over the next two years, institutions receiving Perkins V funds will strengthen collaboration with Local Workforce Development Boards to expand and modernize career pathways that seamlessly connect secondary and postsecondary education to high-demand occupations. This includes scaling work-based learning opportunities, embedding employer engagement in program design, and improving transitions into employment—particularly for priority populations disproportionately impacted by workforce barriers.

Alignment between WIOA and Perkins V is driven at the highest levels through the Workforce Skills Cabinet (WSC) and the State Workforce Development Board, which coordinate cross-agency strategy and investment. The WSC’s leadership in establishing Regional Planning Teams and developing the 2024 Regional Workforce Blueprints reflects Massachusetts’ commitment to a data-driven, regionally differentiated, and sector-focused workforce strategy that addresses both statewide priorities and local economic needs.

The Massachusetts Perkins V plan incorporates WIOA economic analysis and labor market data to guide program development and investment decisions. Perkins-funded institutions are required to collaborate with Local Workforce Development Boards to ensure use of real-time labor market information, strengthen employer partnerships, and reduce duplication across systems. This integrated approach

supports the Commonwealth's goals of expanding talent pipelines, increasing labor force participation, and ensuring employers have access to a skilled and diverse workforce prepared for high-growth industries.

(B) State Strategy for Implementation of Workforce Pell

Massachusetts will implement Workforce Pell by expanding access to high-quality, short-term, career-focused training programs that are closely aligned with labor market demand and lead to industry-recognized credentials. Leveraging tools such as the Commonwealth's Regional Occupational Alignment Dashboard ([ROAD](#)) and the Massachusetts Eligible Training Provider List (ETPL), the Commonwealth will prioritize programs that prepare individuals for high-skill, high-wage, and in-demand occupations, particularly in sectors facing persistent workforce shortages such as healthcare, information technology, and advanced manufacturing.

Workforce Pell will enable more residents—especially adult learners and individuals facing barriers to employment—to rapidly gain skills and credentials that lead to family-sustaining wages and career mobility. At the same time, it will help employers address critical hiring challenges by expanding the pipeline of job-ready talent equipped with industry-aligned competencies.

Implementation will be guided by a coordinated, multi-year strategy led jointly by the Executive Office of Education (EOE) and the Executive Office of Labor and Workforce Development (EOLWD)/MassHire Department of Career Services (MDCS), in partnership with community colleges, training providers, and employers. This includes jointly identifying priority occupations, aligning curriculum and credential requirements, and ensuring program quality and outcomes meet Workforce Pell standards ahead of program launch in July 2026.

This coordinated approach strengthens system integration across education and workforce partners, ensuring Workforce Pell is not implemented in isolation but as a core component of Massachusetts' broader career pathways strategy—designed to be employer-driven, regionally responsive, and accessible to all residents seeking to enter or advance in the labor market.

Stakeholder Engagement

The Healey-Driscoll Administration and MassHire State Workforce Board consistently engage with internal and external partners across Massachusetts. Beginning in the spring of 2023, such engagement helped form the foundation for the Vision and Mission, goals, and strategies outlined in the workforce agenda and *WIOA State Plan*. Building on Massachusetts' *WIOA State Plan*, stakeholders spanned multiple organizations to incorporate feedback that helped shape strategies to attract, retain, and develop talent in Massachusetts while also strengthening the state's workforce infrastructure systems.

The state-level MOU along with the partner MOUs continue to drive collaboration across all WIOA partners. Core program activities for priority populations, including but not limited to adults, dislocated workers, youth, Veterans, low-income individuals, individuals with disabilities, English language learners, formerly incarcerated individuals, and older workers, continue to be administered by WIOA core partners.

The state strategies in the *2024 WIOA Combined Plan* flow from the goals identified by the MassHire State Board. State partners will continue to work with local partners to implement

the goals and strategies to achieve the established vision for the Commonwealth's workforce system. The Massachusetts Partners maintain a statewide *Memorandum of Understanding (MOU)* (*Attachment D*) that memorializes the partners' commitment to implement the goals and strategies described in this section. Many of the specific details on partnerships with business, integrated service delivery and evaluation of results across the Core Program Activities are included in *Section III, Implementing State Strategies and Alignment with Activities* outside the *Plan*, which are combined in a unified response as follows.

Core Program Activities and Alignment across WIOA activities

The State Partner Advisory Committee (SPAC) will work collectively toward implementation of the vision, goals and strategies included in Section II. Major state strategies will be implemented through the Governor, State Workforce Board and the SPAC using the state's oversight, policy and performance roles embedded in the lead state agencies for Core Program Activities. The goal is to use the following processes to drive change across systems:

- **State-level Memorandum of Understanding (MOU)**
- **16 Local MOUs**
- **Regional Planning**
- **Staff Training and Professional Development**
- **Cross-Training: State Partner Programs and Services**
- **WIOA Cohort Work**
- **Specialized Customer Service Partnerships**
- **MassHire Workforce Board Certification**
- **MassHire Career Center Certification**
- **One-Stop Operator Competitive Selection**
- **Performance Analysis (federal WIOA measures and state—designed measures)**

In addition to implementing the state-level MOU and 16 *local MOUs* as required by WIOA, the Commonwealth executes processes for Workforce Board Certification and oversees local processes for Career Center Certification, as well as Regional Planning and the competitive selection process for One-Stop Operators/Service Providers and uses the federal and state-designed performance measures to advance the vision for the system and implement the state strategies described in *Section II (c)* above. These processes include the participation of the WIOA Core Program Partners in review and design to align WIOA activities across programs and with activities outside of the Plan.

State Partner Memorandum of Understanding (MOU): Massachusetts fully implements the key tenants of WIOA to maintain robust partnerships across programs and services with specific focus on improving outcomes by organizing resources, services, and structures through a “customer” lens rather than the bureaucratic administration of federal or state resources. Partnerships and cross-system operations among MassHire Career Centers, Adult Education, Vocational Rehabilitation, and TANF/SNAP maintained through the statewide Memorandum of Understanding (MOU) are based on the state goals and strategies in the Plan. The State MOU

was designed to outline areas of agreement that help the Commonwealth implement WIOA through a shared customer-centered lens, including:

- A coordinated vision for organizing the broadly defined federally funded public workforce system
- Development and expansion of career pathways for business and individuals with barriers to employment and shared customers across WIOA programs
- Shared WIOA infrastructure costs between WIOA programs and MassHire Career Centers
- Guide the maintenance and growth of **16 local area MOUs** that delineate the partnerships and service delivery systems at the local level. The Local Umbrella MOUs are dynamic documents that are kept current through biennial updates, at minimum; updates as appropriate are encouraged.

The *State Partner MOU* continues as a strategy integral to ensuring WIOA policies and principles are implemented through WIOA core and partner programs.

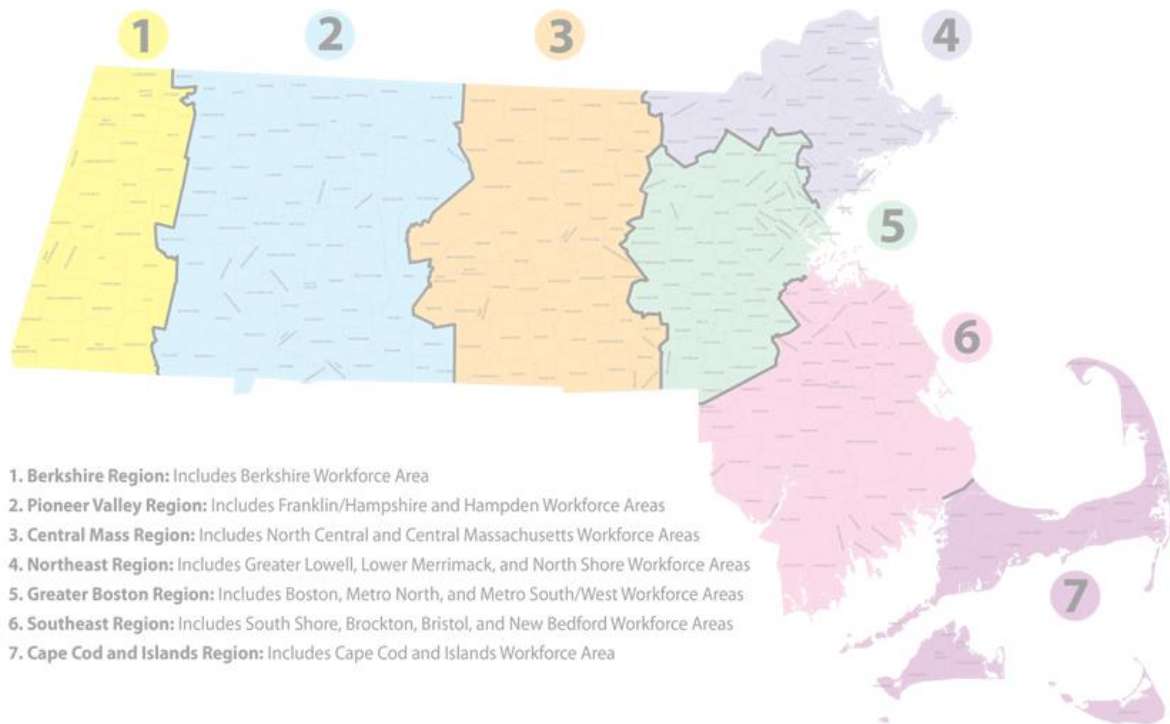
Ongoing work across WIOA Partners promotes alignment between labor demand, service delivery and customer (business and jobseeker) outcomes:

Regional Planning: The regional planning process is led by the Governor’s Workforce Skills Cabinet (WSC), which coordinates state and local programs, policies, and resources to fuel job growth and address employer demand for talent. Seven regional teams across the Berkshire, Pioneer Valley, Central, Northeast, Greater Boston, Cape, and Southeast regions develop and continually refine local strategies for regional labor market blueprints that inform policy development and investments targeted at strengthening the Massachusetts economy. The Regional Planning teams comprise business leaders, community-based leaders, educators, workforce, and economic development professionals. These teams work together to analyze local labor market supply and demand and evaluate the labor pool for measurable gaps in talent. Each region develops a **vision, mission, and measurable goals**; determines **priority industries and occupations**; creates an **asset map** of existing pipeline programs for priority industries/occupations and identifies **regional strategies** to achieve goals. To kick off the FY24 regional planning process Secretaries from Labor and Workforce, Education, Economic Development, and Health and Human Service attended seven in-person regional planning sessions across the Commonwealth to hear and understand regional priorities and to share key priorities of the Workforce Skills Cabinet.

The Regional Planning teams will produce updated *Regional Planning Blueprints* to reflect strategic alignment between workforce, economic development, and education to enhance and ensure the responsiveness to the workforce needs in the region.

FY24 Regional Planning Blueprints are in-progress; prior regional plans can be viewed here: [Regional Planning Blueprints. mass.gov/info-details/view-your-regions-blueprint](https://mass.gov/info-details/view-your-regions-blueprint)

Figure 48: Massachusetts State Planning Regions



MassHire Workforce Board Certification

Responding to the requirements of WIOA (20 CFR Part 679 Subpart C), the Commonwealth continues to drive improvements for the workforce system through high standards of excellence for MassHire Workforce Boards.

Massachusetts' workforce board certification process augments the federal standards required for certification, begun in 2008 as the "High-Performing Workforce Board" initiative. Massachusetts' enhanced board certification standards are intended to move the Commonwealth's workforce boards along a continuum toward increased performance excellence.

The MassHire Workforce Board certification includes standards for workforce board certification to promote improvements in board performance, partnering, business engagement and program oversight.

MassHire Workforce Board certification criteria promote the articulation of regional workforce development activities to optimize services to residents, businesses, and partners. The measurable standards evidence the fact that the work of the boards is both business-driven and aligned with workforce resources through regional markets.

The criteria and standards are focused on quality systems and practices for career center operator competitive one-stop operator selection, career center oversight, youth services strategy and oversight, business-driven strategies and solutions and partnerships/MOUs.

MassHire Career Center Certification

WIOA 20 CFR §678.800 requires One-Stop Career Centers to be certified by the Local Boards, and for the State Board, in consultation with chief elected officials and Local Boards, to establish objective criteria and procedures for use by the MassHire Workforce Boards (MWB) when certifying MassHire Career Centers (MCC). The Massachusetts career center standards, consistent with the Governor's and State Board's guidance and vision, evaluate the MassHire Career Center delivery system for effectiveness in addressing business and job seeker needs in Massachusetts' business-driven workforce delivery system. Massachusetts career center certification includes categories of cost effectiveness, integrated services, accessibility, effective leadership, performance, and responsiveness to the business-driven model. The standards are key indicators of career center fitness, effectiveness, and quality service implementation.

The certification process demonstrates that the WBs oversee the delivery of employment and training programs and business services in their communities through a quality lens and ensures that MCCs are operating at the highest level of effectiveness and sustainability. The certification process gives the WB the opportunity to make a formal assessment of the local service delivery system based on the established standards. Certification is a tool to ensure a consistent level of quality in the services provided by each MCC, statewide.

One-Stop Operator Competitive Selection Process

The Workforce Innovation and Opportunity Act (WIOA) requires that Local Boards, in agreement with the Chief Elected Official, select One-Stop Career Center Operators through a competitive process to be conducted not less frequently than every 4 years. Local Boards must each conduct an open, transparent, procurement process to select one-stop operators in compliance with WIOA law and regulations, applicable local procurement rules/policy and *Massachusetts' One-Stop Operator Competitive Selection Policy* mass.gov/doc/competitive-selection-of-operatorservice-provider-of-one-stop-career-center.

The Commonwealth of Massachusetts authorized/empowered the 16 MassHire Workforce Boards (Local Boards) as the entities to conduct the competition to procure a One-Stop Career Center Operator/Service Provider within their Local Workforce Area (Local Area), pursuant to their responsibility under sec. 107(d)(10)(A); sec. 121(d)(2)(A) of WIOA; *COFAR/Uniform Circular 2 CFR 200* and *MassWorkforce Issuance 100 DCS 01-102 (Procurement and Contracting)* mass.gov/files/documents/2016/08/sy/01-102.pdf.

This is a limited authorization for Local Boards to conduct the procurement of the one-stop operator only. It recognizes the Local Board's authority and negotiating and oversight roles but does not empower local boards outside that authority and role to execute one-stop operator contracts or contracts for operator space, nor relieve Local Boards from compliance with municipal rules and the CEO-designated authority of the Fiscal Agent.

Local Boards use a competitive process that meets the requirements of sec. 121(d)(2)(A) of WIOA while remaining consistent with the principles of competitive procurement set forth

in the Uniform Administrative Guidance set out at 2CFR 200.318 through 200.326 and MassWorkforce Issuance 100 DCS 01-102 (Procurement and Contracting). At the conclusion of the competitive process, the recommendation to award a contract to the selected One-Stop Operator is ratified by a quorum-vote of the full Local Workforce Board membership at a properly posted public meeting.

The Executive Office of Labor and Workforce Development (EOLWD)/MassHire Department of Career Services (MDCS) continues to provide extensive written and in-person guidance throughout the procurement process.

FY2024 Adult and Community Learning Services Adult Career Pathway Partnership

To support the *State Plan* “career pathways” vision, the Department of Elementary and Secondary Education (DESE), Adult and Community Learning Services (ACLS) has committed \$200,000 in Adult Career Pathway funds to support local workforce area efforts to work in partnership with local adult education programs to identify and develop career pathway opportunities for adult learners.

The ACLS Adult Career Pathway funds are allocated to the 16 MassHire Workforce Boards based on FY2023 adult education student enrollments in each of the local workforce areas.

MassHire Workforce Boards work in partnership with local adult education programs in the development of career pathways opportunities for adult learners. Funds are provided to the Workforce Boards to support the following activities: review of adult education proposals (CALC, workplace education, etc.); participation of MassHire Workforce Board staff on program quality reviews (PQR) (monitoring) and selected site visits and related trainings to determine the quality of services against a set of Indicators through a diagnostic assessment. The reviews ensure state and federally funded adult education providers are compliant with state and federal policies.

ACLS funding allocated to MassHire Workforce Boards support the development of effective business partnerships to employ adult education graduates. MassHire Workforce Boards provide support and guidance to adult education programs related to the development of viable career pathways for adult learners in the local workforce area as well as to adult education programs for the development of bridge classes and integrated education and training programs serving “shared customers” and to adult education staff who are out stationed at MassHire Career Centers.

Massachusetts Rehabilitation Commission Training Partnership

The Massachusetts Rehabilitation Commission (MRC) provides training funds to MassHire Career Centers (MCCs) to provide occupational training to MRC consumers.

MRC has committed funding to support workforce training for MRC consumers on an annual basis since FY19. MassHire Department of Career Services (MDCS) and MRC partner

to assist training ready MRC consumers to enroll in workforce training through Individual Training Accounts (ITA) with the goal of increasing employment opportunities. Funds provided by MRC for training are supplemental to WIOA training funds.

All MRC consumers referred to the MassHire Career Center system are required to complete a career center registration, which allows MRC consumers access to basic services, including labor exchange services, information on programs and services, and referrals. MRC consumers who complete a career center registration are considered shared customers.

FY24 saw an infusion of \$627,500 into the MassHire Career Center system. MRC is committed to the ongoing continuation of this program.

Work Participant Program (WPP)

The Department of Transitional Assistance and the MassHire Department of Career Services (MDCS) collaborate to operate the Work Participant Program (WPP) to provide career planning support and resources to DTA clients, who are prioritized by WIOA.

Staff work in partnership to ensure that Transitional Aid to Families with Dependent Children (TAFDC) and Supplemental Nutrition Assistance Program (SNAP) clients receive tailored and appropriate job readiness, job matching, coaching and employment supports. The DTA designated staff (Full Engagement Workers/FEWs) from DTA local offices are also co-located at the MassHire Career Centers and provide support, information, and resources to Career Center staff and DTA clients on a locally established schedule and frequency.

The Local WIOA Memorandum of Understanding (MOU) and regular, ongoing local partner meetings drive the model for local partner staff to work together to provide a full array of services to shared customers, the range of which encompasses initial assessment, career planning, workshops, event coverage and more.

The successful completion of WPP services is expected to result in full-time, unsubsidized employment aligned with labor market needs and participant goals toward a career pathway.

The FY24 funding level for the WPP program is currently \$1,000,000. DTA is committed to the ongoing continuation of this partnership.

Staff Training and Professional Development Overview

The Executive Office of Labor and Workforce Development/MassHire Department of Career Services (EOLWD/MDCS) continues the process of assessing the current skill level of career center staff and analyzing the knowledge, skills, and abilities needed to perform each job in the career center. EOLWD/MDCS continues to offer regular professional development opportunities for workforce board and career center staff to ensure that

their knowledge and expertise is current and consistent with the specific opportunities and needs within their regional areas.

To facilitate easy access to professional development opportunities and MassHire training to support exemplary service to jobseekers and business, MDCS has established a webpage that lists a monthly staff training calendar. Staff select professional development and training offerings such as Labor Market Information (LMI) and Tools, Customer Service Basics for the Modern Workplace, as well as required program specific training such as WIOA Title I: Adult and Dislocated Worker Training. MDCS Training Calendars can be found here: [All MDCS Staff Training. mass.gov/info-details/all-mdcs-staff-training](https://mass.gov/info-details/all-mdcs-staff-training).

(B) Alignment with Activities outside the Plan. Describe how the activities identified in (A) will be aligned with programs and activities provided by mandatory One-Stop partners and other optional One-Stop partners and activities provided under employment, training (including Registered Apprenticeships), education (including career and technical education), human services and other programs not covered by the plan, as appropriate, assuring coordination of, and avoiding duplication among these activities.

Massachusetts will continue to work collaboratively across the workforce system to ensure continued alignment with WIOA requirements. This will include enhancing existing partnerships and developing new ones. The State Workforce Advisory Committee (SWAC) will continue to convene WIOA core and non-required partners.

The Massachusetts workforce system comprises both Core WIOA partners and non-required WIOA and other partners. The State Partner Advisory Committee (SPAC) convenes both WIOA Core and non-required WIOA partners to share resources and to strategize on an alignment of services. This constellation of partner programs and agencies are leveraged to meet the broad needs of jobs seekers and businesses. Core WIOA and non-required WIOA partners attend regular SPAC meetings to learn about and share information on respective partner program and agency initiatives and goals. Agencies not covered in the plan that have been invited to attend the SPAC meetings include the Office of Career and Technical Education as well as Department of Corrections. The SPAC meeting provides a forum to gain a deeper understanding of the work partners are engaged in and to strategize ways to be more intentionally aligned going forward and to avoid duplication.

State partners – mandatory WIOA partners and optional partners including economic development, education, human service, and other providers – signed the state level MOU to ensure alignment of service activity to the vision, goals, and strategies of the Plan.

Career and Vocational Technical Education (CVTE) and Apprenticeship opportunities are aligned to workforce activities described in (A) through the state and within the 16 local areas.

The sixteen MassHire Workforce Boards, through their board membership participation and strategic planning, develop strategies and actions to promote the alignment of all

programs with WIOA-funded programs and non-mandatory programs under each *local MOU* (the template of which is based upon the *State MOU*).

(C) Coordination, Alignment, and Provision of Services to Individuals. Describe how the entities carrying out the respective core programs, *Combined State Plan* partner programs included in this plan, and mandatory and optional One-Stop partner programs will coordinate activities and resources to provide comprehensive, high-quality, customer-centered services, including supportive services to individuals including those populations identified in section II(a)(1)(B), and individuals in remote areas. The activities described shall conform to the statutory requirements of each program.

Massachusetts will continue to work collaboratively across the workforce system to ensure continued alignment with WIOA requirements.

The MassHire Workforce Boards, Career Centers and Core Partner Programs continue to provide services to job seekers, consumers, participants, students, etc., based on the mission and directives of the existing resources and resulting service systems. Guided by the *WIOA Combined State Plan*, these partners work together to leverage relationships with the business community and to develop a coordinated approach to outreach and service delivery. Connecting outreach activities to job placement across the partners demonstrates significant evidence of a highly-integrated system.

Massachusetts' focus on "priority of service" requirements ensures that individuals with barriers (including individuals who are low-income, have limited skills, are recipients of public assistance, homeless, have a disability, limited English, age barriers, or face other barriers to employment) are able to access critical employment and training services through the MassHire Career Center system.

Core WIOA Program Partners and other broader workforce partners work together with MassHire Career Centers to:

- **Build out "pathway maps" or customer-centered design models** for specific populations for "shared" customers between partner programs to create a clear understanding of how multiple providers, services and resources should support an individual person or business.
- **Improve the MassHire customer flow** and service practices to prioritize individuals with barriers and work across partner agencies.
- **Utilize robust technology tools to scale-up practices and provide more significant supports for individuals with barriers to employment**, including basic skill assessment, remediation, and career development tools.
- **Sponsor cross-training for staff across partner agencies** (Statewide MOU) to understand the needs of populations and available resources to make referrals and

customize services based on customer need, including cross-training for resources such as, MassHire JobQuest, TORQ, Career Information System, etc.

- **Track and evaluate the outcomes** for individuals who face barriers to employment (see federal WIOA measures and state-designed measures in Section II).

Models and Services for WIOA Target Populations

All partners place highest priority on work with job seekers who represent populations in need of additional support. The 16 local MOU teams meet regularly to examine career center service provision and think through process improvements that often lead to the re-design of specific career center services. Grant-funded or state-based initiatives often supplement and expand upon the ability of the public system to work with individuals who face barriers to employment:

a) **Age Barriers:** MA-SCSEP works closely with the Executive Office of Labor and Workforce Development (EOLWD) to help promote and coordinate the SCSEP and MassHire Career Center service delivery systems. State strategies of the *State Plan* outline specific steps in pursuit of the goals to achieve the vision for the workforce system. To that end, EOEA (Executive Office of Elder Affairs) will work with EOLWD to enhance the services to customers of the One-Stop Career Centers by:

- Training MassHire Career Center staff on the needs of people 55 and over
- Offering more training classes geared to people 55 and over
- Helping Business Service Representatives (BSRs) establish more effective employer pipelines to hire older workers

b) **Low-Income, Low-Skilled:** individuals who are homeless, receiving public assistance or public housing, those with *CORI* issues, or individuals with limited skills (LEP or lack of high school credentials etc.) face challenges that require multiple supports offered across a range of partners.

State-level partners have developed curriculum and delivered cross-training to ensure staff at multiple agencies can help an individual understand available resources, the impact of work on wages and public benefits (benefits counseling or “cliff effect” information for TANF-SNAP), and next steps to move along a career pathway. The adult education network of providers contributes information on evidence-based models that support integrated education and training, career pathways, wraparound/college and career readiness support services to assist staff in building supports that create positive outcomes for low-income, low-skilled populations.

c) **Individuals with Disabilities:** MassHire Department of Career Services, Massachusetts Rehabilitation Commission, and the Massachusetts Commission for the Blind as well as a variety of disability service agencies work together to enhance and build employment related services for individuals with disabilities. MassHire through its network of career centers is committed to ensuring all individuals regardless of disabilities have access to integrated programs and services.

MRC Vocational Rehabilitation and its Core Workforce partners developed a *Memorandum of Understanding (MOU)* with each of the 16 Workforce Development Boards (WDB) in the Commonwealth. The MOUs outline the activities that will be aligned across the partnership. These activities include but are not limited to pre-employment vocational services, post-secondary education services, Adult Basic Education (ABE), MassHire Career Center services, cross-training of staff, consultation on accessibility issues, sharing employer and labor market needs and information job seeker training opportunities in specific geographic areas across the state, among others. The Commonwealth continues to examine options for establishing a common client ID to share information and referrals between partners regarding common consumers. The *MOUs* address each region's infrastructure needs to operate successfully and ensure alignment.

The Commissioner of MRC is a member of the *State Plan Advisor Committee (SPAC)*. In addition, MRC has staff members assigned to each MWB and career centers across the Commonwealth and plays key roles in the WIOA SPAC and associated WIOA planning committees including the Common Measures Committee, Policy, and Youth Workgroup, ensuring the needs of individuals with disabilities are blended and braided into all workforce system activities.

The MRC's job placement specialists and other assigned MRC staff work closely with local MassHire centers and core partners to provide high-quality vocational rehabilitation services to persons with disabilities seeking expanded employment opportunities and to assist the career centers and other partners to better meet the needs of individuals with disabilities. MRC provides training, including disability sensitivity training, accessibility, and information and referrals for career center and partners.

MCB has staff members assigned to each MWB and MassHire center across the Commonwealth and plays key roles in the WIOA Steering Committee and associated WIOA planning committees including the Common Measures Committee, Policy, and Youth Workgroup, ensuring the needs of individuals with visual disabilities are blended and braided into all workforce system activities.

The MCB's employment specialists and other vocational rehabilitation counselors work closely with local career centers and core partners to provide high quality vocational rehabilitation services to persons with visual disabilities seeking expanded employment opportunities and to assist the career centers and other partners to better meet the needs of individuals with visual disabilities. MCB provides consultation on accessibility and training, including disability sensitivity training, accessibility, and information and referrals for career center and partners.

Massachusetts will continue to implement practices and strategies identified through earlier Disability Employment Initiative (DEI) grants intended to increase access to career center services and expand capacity within existing career pathways to serve youth and adults with disabilities. The DEI was jointly funded by the Office of Disability

and Employment Policy and Department of Labor's Employment and Training Administration. MassHire Career Centers involved in the DEI projects have implemented proven practices that have improved quality of services that have contributed to increased employment outcomes for individuals with disabilities. Disability Resource Coordinators (DRC) were hired to implement the provision of services outlined in the grant, and included building integrated resources teams, blending and braiding of resources, and strengthening collaborations and partnerships to serve individuals with disabilities.

The value of the Massachusetts DEI model demonstrated the benefits of linking education, credential training, and job training and benefits counseling with utilization of the federal Ticket to Work Program. Prior grants and resources for this population were solely focused on employment and did not expand work to enroll more individuals into post-secondary or training programs.

MassHire, Vocational Rehabilitation, and other partners have participated in a customer-centered design process to identify new ways to integrate and share services. MassHire will work toward scaling service design strategies created for the Disability Employment Initiative grants to regions of the state that were not awarded these resources.

As a result of participation with DEI the following best practices have been identified:

- Staff training on issues and resource regarding disabilities
- Benefits planning for individuals on either SSI or SSDI
- Engagement with MassMatch the state's assistive technology agency
- Exposure to Employment Networks and Ticket to Work
- Implementation of IRTs (Individual Resource Teams)
- Enhanced and continued partnership with MRC and MCB

These practices will be scaled across the 16 workforce areas to ensure a more systemic approach to serving individuals with disabilities.

d) Homeless: MassHire Workforce Boards and Career Centers foster ongoing local partnerships with shelters and organizations that specialize in services for homeless individuals.

MassHire Career Centers maintain lists of resources and local contacts to assist the Homeless population. The web-based registration form within MassHire JobQuest asks the "Are you Homeless" question that serves to alert staff to a customer's situation.

Immigrants in Emergency Assistance (EA) Shelters

Executive Office of Housing and Livable Communities (EOHLC) has several programs targeted to serving the Homeless, such as:

- Emergency Housing and shelter
- Housing Stabilization programs
- Secure Jobs Initiative
- Rental Assistance
- HomeBASE (provides funding for furniture; first and last month's rent; utilities; travel costs, etc.)

On August 8, 2023, Governor Healey declared a state of emergency due to the rapidly rising numbers of families arriving in Massachusetts, requiring the state's shelter system to expand in an unsustainable manner. The MassHire Workforce System is poised to play a vital role in ensuring immigrants in shelters have access to career services to prepare them for and find employment. MassHire provides a variety of resources, including workshops on resume writing, digital literacy, and job search skills that can assist immigrants in shelters on a pathway to careers across industries and occupations in Massachusetts, with particular focus on those industries and occupations that are experiencing workforce shortages. Immigrants in shelters with or without work authorization have access to basic MassHire career services.

Since mid-November 2023, services have been provided to 1000+ immigrants in shelter. MDCS looks forward to our continued work with this population. (e) **Veterans:** MassHire Department of Career Services, as well as a variety of Veteran service agencies, work together to enhance and build employment related services for Veterans. MassHire, through its network of career centers is committed to ensuring all Veterans and their families have access to integrated programs and services.

Dedicated staff is available throughout the state to help Veterans transition to civilian employment. Veterans and their eligible spouses receive Priority of Service throughout the full array of services provided through the Career Center system. Veterans' employment representatives also:

- Supervise services to Veterans including assessment, counseling, and identifying training and employment opportunities
- Monitor federal job listings to ensure eligible Veterans get priority referrals
- Promote participation in federally funded employment and training programs
- Work with the [U.S. Department of Veterans Affairs va.gov/](https://www.va.gov/) to identify Veterans who need work-specific prosthetic devices, sensory aids or other special equipment

- Contact community leaders, employers, unions, training programs, and Veterans service organizations to ensure eligible Veterans get the services to which they are entitled

(f) **Long-Term Unemployed:** MassHire Career Centers offer various workshops targeted to older and long-term unemployed individuals, such as:

Age-Related Questions: a clinic that gives participants an opportunity to brainstorm age-related questions that might be asked in an interview or might be in the mind of an interviewer but not asked.

Using Age to Your Advantage: explores common misconceptions about age in the workplace and outlines the advantages seasoned workers bring to the table.

Hire Opportunity: an intensive series of weekly two-hour sessions over six weeks that features group activities and peer support to help participants approach their job searches with sharpened skills, renewed energy, and focus.

(g) **Individuals with Substance Use Disorder:** Massachusetts is currently operating two Disaster Recovery National Dislocated Worker Grants to Address the Opioid Crisis, which place particular focus on long-term unemployed individuals affected by the opioid crisis.

(h) **Formerly Incarcerated Individuals:** MassHire Department of Career Services, as well as a variety of agencies are working together to enhance and build employment related services for formerly incarcerated individuals. MassHire, through its network of career centers, is committed to ensuring individuals have access to integrated programs and services.

The Department of Correction (DOC) is included in the membership of the State Partner Advisory Committee. The DOC shares updates with the SPAC on programs and services available to inmates through personalized program and individual reentry planning. MDCS and DOC work in collaboration to streamline a referral process to MassHire Career Centers for inmates in the pre-release stage and upon release of returning to the community. Through MassHire, formerly incarcerated individuals have access to basic career center services such as labor market information. information on programs/services, program referrals, and self-service activities. Formerly incarcerated individuals with an interest in receiving individualized services such as development of an individualized employment plan will be assessed for eligibility. Formerly incarcerated individuals that are interested in training will be provided with the *Massachusetts Eligible Training Provider List (ETPL)* and informed on applicable eligibility requirements.

(D) Coordination, Alignment, and Provision of Services to Employers. Describe how the entities carrying out the respective core programs, any *Combined State Plan* partner program included in this plan, mandatory and optional One-Stop partner programs will coordinate activities and resources to provide comprehensive, high-quality services to

employers to meet their current and projected workforce needs and to achieve the goals of industry or sector partners in the state. The activities described shall conform to the statutory requirements of each program.

Massachusetts will continue to work collaboratively across the workforce system to ensure continued alignment with WIOA requirements.

Coordination and collaboration of the partners and entities that provide services to businesses is a major business service strategy for the Commonwealth. The MassHire BizWorks program continues to improve the coordination and collaboration of the partners and entities that provide services to businesses. The key principles established to guide business services across partner agencies across the Commonwealth are:

- There is “no wrong door” for business services; business assessments are consistent, regardless of the entry point,
- A single point of contact within a coordinated regional structure/strategy is a key business-serving tenet,
- All staff, regardless of their role, are to be well versed in the leading industry sectors in their local area and region,
- All staff have a role in collecting business intelligence and contribute to their organization and local system learning about business needs,
- All staff, regardless of their role, must be well-versed in the needs of employers who are Federal Contractors to ensure that a diverse talent pool is available to meet their needs and to assist them with compliance of Section 503 of the Rehabilitation Act of 1973, as amended (Section 503) at 41 CFR Part 60-741,
- All staff represent the MassHire Workforce System (not just a specific center, program, or agency) and are ambassadors to other state system partners offering business services.

MassHire BizWorks continues to lead efforts around marketing, staff development and systems/communications with a primary focus of information sharing, coordinating, and making linkages electronically. Examples include:

- The MassHire BizWorks Business Information and Knowledge Exchange (BIKE) committee dashboard,
- MassHire BizWorks Marketing committee activities include minority and business outreach programs, “Let’s Connect” for employers, BizWorks quarterly newsletter and regional employer focus groups,
- MassHire BizWorks Staff Training and Development committee offers training to MassHire business and partner agency staff,
- Participation in Chambers of Commerce and business association meetings, business to business expos and provision of speakers at regional business events.

MassHire BizWorks committee activities purposefully include minority-owned business outreach with a focus on bringing awareness and access of available resources.

WIOA program partners participate in the MassHire BizWorks organizing efforts. The Massachusetts Rehabilitation Commission (MRC) has a robust set of outreach and direct service activities with businesses across the state and works with many employers across programs funded by Title IV of WIOA. MRC participates in a business strategy workgroup between key workforce partners as part of the Commonwealth's efforts to coordinate services to employers across partner agencies and subscribes to the established key principles to guide business services amongst key partner agencies.

The Massachusetts Business Leadership Network (MassBLN) is an affiliate of the US Business Leadership Network (USBLN) initiative, a national business-led endeavor upholding workforce initiatives that enable qualified individuals with disabilities to succeed in the workplace. Over the next 4 years, the Massachusetts Business Leadership Network will be engaged to expand employer capacity to ensure a diverse marketplace that includes people with disabilities as both customers and employees.

(E) Partner Engagement with Educational Institutions. Describe how the State's Strategies will engage the State's education and training providers, including community colleges and area career and technical education schools, as partners in the workforce development system to create a job-driven education and training system. WIOA section 102(b)(2)(B)(iv). Include how the State's strategies will enable the State to leverage other Federal, State, and local investments to enhance access to workforce development programs at these institutions.

MassHire is reimagining business services through a dedicated employer engagement department. This will create a more coordinated, strategic, and relationship-driven approach to serving Massachusetts' priority industries. This model establishes clear governance, consistent outreach standards, and a unified structure that ensures every employer regardless of sector or region experiences MassHire as an organized, responsive, and data informed partner. MassHire will assign industry leads, standardize communication where possible, and develop shared tools. These actions look to strengthen alignment with labor market needs while reducing duplication across regions. MassHire looks to have a structured cadence of quarterly roundtables, bimonthly check-ins, and annual summits keeping employer relationships active and ensuring emerging needs are captured in real time, shaping training investments and service delivery. Clear metrics and quarterly reporting will create accountability and transparency, tracking employer engagement, partnership growth, and outcomes tied to training and hiring. Finally, a built-in continuous improvement cycle ensures the model evolves with labor market shifts and employer feedback. Together, this reimagined structure positions MassHire to deliver a modern, coordinated, and industry aligned business services system

that strengthens employer partnerships and supports a more responsive workforce ecosystem.

The vision for the *WIOA 2024 Combined State Plan* to promote the progression of individuals along career pathways relies upon a larger number of individuals moving into post-secondary attainment of credentials to meet the job demand in the Massachusetts economy. While higher education is not a required Core Partner program in WIOA, our higher education system, represented by the Executive Office of Education, is a key member of the Workforce Skills Cabinet and in the implementation of the *WIOA Plan*. State leaders' focus is on new strategies that assist more individuals, especially individuals with limited education and skill, in accessing higher education. Education partners are building on the state's past success with the USDOL TAACCT initiatives. The Department of Transitional Assistance and the Executive Office of Community Colleges identified additional opportunities to expand access to post-secondary credentialing for SNAP recipients through recruitment and SNAP Employment and Training (E&T) reimbursements. The Administration continues to support sector initiatives in high demand occupations.

The MassHire Workforce Boards and Career Centers, adult education and post-secondary systems have had the experience of rethinking the connections and pathways for individuals who need to move from low to mid- to high-skilled credentialing and continue to build on those lessons. New or revised, accelerated, stackable programming is now delivered at many community college campuses. Statewide teams continue to deliver and look to develop industry recognized curriculum in targeted industry sectors, and the ABE system (Title II) and developmental education faculty from most campuses helped develop and are utilizing contextualized curriculum modules to better prepare students for high-demand careers.

Education partners are critical to meet the training needs of MassHire job seekers. With the knowledge gained about the different systems, leveraging, and braiding resources is a regular practice, which has helped Massachusetts increase the number of individuals using WIOA funding through Individual Training Accounts at community colleges. In addition, the new Administration applied for a longitudinal data grant through US Department of Education to build out the capacity to share wage record data and information across education and workforce systems. This data analysis designed under this grant will open new doors to understand which initiatives and interventions are most successful.

(F) Improving Access to Post-secondary Credentials. Describe how the State's strategies will improve access to activities leading to recognized postsecondary credentials, including Registered Apprenticeship certificates. This includes credentials that are

industry-recognized certificates, licenses, or certifications, and that are portable and stackable. See below.

Massachusetts will continue to work collaboratively across the workforce system to ensure continued alignment with WIOA requirements.

The vision for the *WIOA 2024-2028 Combined State Plan* to promote the progression of individuals along career pathways relies on individuals moving into post-secondary training programs to attain a credential to meet the job demand of Massachusetts employers. While higher education is not a required Core Partner program in WIOA, our higher education system, represented by the Executive Office of Education, is a key member of the Workforce Skills Cabinet and in the implementation of the *WIOA Plan*. Vocational High Schools are also a key partner and resource in providing post-secondary training for in-demand occupations throughout a variety of industry sectors. State leaders will focus on new strategies that assist more individuals, especially individuals with limited education and skills, in accessing higher education. Concrete examples of state strategies that engage education partners include:

- Tri-Chairs for the Workforce Skills Cabinet Regional Team, led by the Workforce Board, Education partner and Economic Development partner. (See next section)
- Alignment of state and regional investments in educational and training pathways through Workforce Skills Cabinet policy and programs
- Utilization of funding to upskill the workforce for in-demand occupations throughout a variety of industry sectors. This training would be funded by way of the Workforce Training Fund, Career Technical Initiative, Replenishing Employer Investment in Education and Work fund. Additionally, industry sector partnerships enhance the relationships of community colleges, MassHire Career Centers, and employers
- Education partners in sector strategies (partnerships between business, education, and workforce to train individuals for high-demand jobs)
- Approval of education partners on the *Education Training Provider List*.
- Community College operation of a MassHire Career Center (procured through competitive selection as the Career Center operator)
- Approval of education partners providing Related-Training Instruction for Registered Apprenticeship

(G) Coordinating with Economic Development Strategies. Describe how the activities identified in (A) will be coordinated with economic development entities, strategies, and activities in the State.

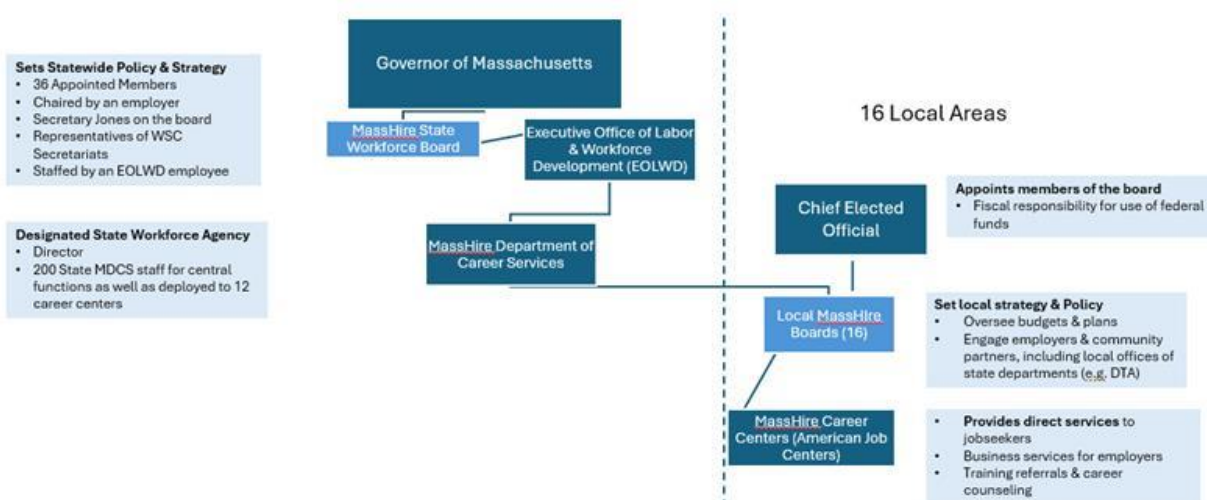
Massachusetts will continue to work collaboratively across the workforce system to ensure continued alignment with WIOA requirements.

As discussed in Section II goals and strategies, the Commonwealth developed its Economic Development Plan with significant input from the education and workforce systems. The Economic Development Plan – titled Partnerships for Growth – calls out workforce development as one of four pillars in the Plan. In addition, the Governor leveraged the required WIOA regional planning process to create an integrated regional planning process across the economic, education, and workforce Secretariats. regional planning structure is based on an aligned regional map between workforce areas, economic development, and education regions. The process required seven coordinated teams led by MassHire Workforce Boards, Community Colleges, and Vocational Technical Schools, and economic development (Massachusetts Office of Business Development) with additional partners (business leaders, community-based-organizations, etc.) to ensure that education and training systems are focused on the career pathways needed in the regional economy. The regional leadership from economic development therefore drives the activities of the Workforce Boards and key WIOA partners through the resulting regional plans.

Coordination in the development of economic development strategies occurs through regular meetings and communication between the Rapid Response team, the MassHire BizWorks team and the Massachusetts Office of Business Development (MOBD), which conversely is a partner in the MassHire BizWorks program. The Rapid Response director is a voting board member of MOBD's EACC board, the entity that approves tax incentives for growing businesses. The Rapid Response team coordinates with MOBD on business growth strategies as well as business layoff activities.

State Operating Systems and Policies

Massachusetts will continue to work collaboratively across the workforce system to ensure continued alignment with WIOA requirements. The below updated Figure 49 demonstrates the Workforce System Governance Structure which supports coordinated implementation of state strategies.



(a) **State Operating Systems and Policies** The *Unified or Combined State Plan* must include a description of the State operating systems and policies that will support the implementation of the State strategy described in section II **Strategic Elements**. This includes-

(1) The State operating systems that will support the implementation of the State's strategies. This must include a description of-

State operating systems that support coordinated implementation of State strategies (e.g., labor market information systems, data systems, communication systems, case management systems, job banks, etc.).

Systems to Support Coordination

Economic Research

The Department of Economic Research (DER) is a newly established department within the Executive Office of Labor and Workforce Development that produces, analyzes, and distributes various data, labor market reports, and other resources related to employment, unemployment, occupations, industries, and other components of the Massachusetts labor market. The Department's data enjoys a cooperative agreement with the United States Department of Labor's Bureau of Labor Statistics (BLS), the Employment and Training Administration (ETA), and the United States Census Bureau. The Department is focused on producing reliable and timely data to assist individuals make data-driven decisions in the areas of business, career, and education.

Labor market data and economic statistics are publicly available on the EOLWD website to help stakeholders make informed plans, choices, and decisions for a wide range of purposes, including business investment decision-making, career planning and preparation, education and training offerings, job search opportunities, hiring, and public or private workforce investments. The Department also works with local workforce development system partners as well as external stakeholders to provide custom workforce data, which further the efficiency and impact of the system.

Currently, the core partners each have a myriad of tools available to assist customers in the development of career pathways and the state workforce agency offers these tools to partner agencies and their clients through online systems.

Lightcast - provides job market data to enable the identification of opportunities for training programs, closer alignment of education and training initiatives with employer demand, and improved site selection and recruiting decisions.

Transferable Occupation Relationship Quotient (TORQ) - an LMI tool that provides a real-time triage process that analyzes an individual's occupational knowledge, abilities, and skills, and assesses the transferability of those characteristics to other, potentially more in demand, occupations they might not have considered.

MassHire JobQuest - the workforce system's front-facing web application used by members of the public (job seekers and businesses) to access programs and services. For jobseekers, these include job search and training programs, and for employers, MassHire JobQuest allows them to post jobs and to locate qualified job candidates. Over the past three years, EOLWD/MDCS has made significant improvements to the MassHire JobQuest system in terms of enhancements for jobseekers and is now in the completion phase of enhancements to the employer experience.

ACT WorkKeys Curriculum - a self-paced, adaptive, online remediation system supports the evaluation and development of employability skills, graphic literacy, numeracy, and reading comprehension for the workplace. Through this assessment, staff can match the skill assets of participants against occupational requirements to improve screening and candidate referral.

MassHire 360 Career Information System (CIS) - is a free on-line application that is offered to all Massachusetts residents. MassHire 360 is designed to provide occupational and educational information to help people make better-informed career and school choices. MassHire 360 contains career, education, and workforce information, as well as many career exploration tools. The Executive Office of Labor and Workforce Development's (EOLWD), MassHire Department of Career Services (MDCS) provides MassHire 360 to Massachusetts residents free of charge. MassHire 360 has four versions: Junior High School, High School, Adult, and College. With a fifth-grade-level reading requirement, this product is also appropriate for special populations. MassHire 360 provides comprehensive career information for students developing and updating educational plans using tools that encourage self-assessment, exploration, research, goal-setting, and decision-making. Use of MassHire 360 in high school supports lifelong career planning and promotes career self-reliance.

(B) Data-collection and reporting processes used for all programs and activities, including those present in One-Stop Career Centers.

Data-collection and reporting processes

The core partners each have separate data and operating systems described in the next sub-section. To address immediate WIOA needs for the partners, the Commonwealth is exploring the use of MassHire JobQuest as the main entry portal for individuals who intersect with the MassHire Career Centers and who may be "shared" between two WIOA enrollments (both job seekers and employers). Beginning in 2021, MassHire engaged in a major upgrade of MassHire JobQuest for both job seekers and employers. MassHire is expected to complete the upgrade in February 2024. MassHire has

embarked upon the research and development of request for proposal (RFP) content to replace the Massachusetts One-Stop Employment System (MOSES) that has served since 2000. In the long term, the WIOA partners are working toward a technological system integration to facilitate the customer flow for our shared customers.

Data Collection and Reporting Systems for Core WIOA programs - The largest group of workforce development programs is administered by the **MassHire Department of Career Services (MDCS)** within the Executive Office of Labor and Workforce Development (EOLWD), all of which operate through the State's network of MassHire Career Centers and Workforce Boards. MDCS manages the Massachusetts One-Stop Employment System (MOSES) - a client/server application and database that serves as the unified management information, client tracking, case management, and reporting system used by staff at career centers and other workforce development service providers in Massachusetts. The application is distributed through AWS (state staff) or AppStream (non-state) providing users with flexibility for data entry and report access. MOSES collects information and tracks data through the MOSES database for the following programs: • Title I Adult • Trade Adjustment Assistance (TAA) • National Dislocated Worker Grants • Title I Dislocated Worker, including Rapid Response • Jobs for Veterans State Grant (JVSG) • Disability Employment Initiative Grants (DEI) • Title I Youth • Migrant Seasonal Farm Worker (MSFW) • Unemployment Insurance employment assistance services • Reemployment Services and Eligibility Assessment (RESEA).

Several web-based applications collect information and interface with the MOSES database, including: (a) MassHire JobQuest used by job seekers to access job listings, eligible training providers and courses, services and workshops at career centers, and to link to TORQ and MassHire Career Information System (MassHire CIS), and is also used by employers to post jobs, search for qualified applicants and manage hires; (b) MassHire TrainingPro used by training providers to register for approval under WIOA ITAs, Trade TAA and UI Section 30 (TOP, Training Opportunity Program for UI Claimants); (c) WOTC application providing on-line access for employers seeking tax credits and interfaces with the Department of Transitional Assistance to verify TANF/SNAP eligibility; and (d) a link to the Foreign Labor Certification application developed to manage H2B, while H2A is managed through the new DOL FLAG system.

The **Department of Elementary and Secondary Education's Adult and Community Learning Services (ACLS)** unit oversees Title II. ACLS utilizes LACES (Literacy, Adult, and Community Education System) by LiteracyPro Systems, Inc. to meet the National Reporting System (NRS) requirements.

LACES is a web-based electronic data collection and reporting system. Local adult education providers submit student-level data (demographics, participation, assessment, and post-exit outcomes) and the application aggregates the information to meet the WIOA Title II reporting requirements.

LACES interfaces with Diploma Sender to receive GED and HiSET high school equivalency results and with the University of Massachusetts, Amherst to receive MAPT (Massachusetts Adult Proficiency Test) scores. Local providers can enter employment, post-secondary enrollment, and credential attainment outcomes.

ACLS also matches participant wage records with the MA Department of Unemployment Assistance (DUA) and the State Wage Interchange System (SWIS). ACLS matches postsecondary enrollment with the Department of Higher Education (DHE) and the National Student Clearinghouse (NSC). DUA, DHE, NSC, GED and HiSET outcomes are added to the LACES records for exited participants who signed release forms. The wage, postsecondary enrollment, and high school equivalency results of participants who did not sign the release form and all SWIS outcomes are hidden from local access.

ACLS uses LACES to monitor grantee performance and compliance. All providers have enrollment and performance targets. State policy requires timely data collection and entry. This enables locals and the state office to monitor performance. LACES has a range of tools, reports, and diagnostics to support day-to-day operations and identify data issues quickly.

The **Massachusetts Rehabilitation Commission agency** (formerly the Massachusetts Rehabilitation Commission) currently utilizes a web-based Management Information System known as MRCIS, which serves as the case management and data system for MRC's Vocational Rehabilitation Program. Data is tracked and managed at the client level for all MRC VR consumers. The system documents and covers all aspects of the VR process from referral to exit. The system is used to produce a quarterly data file entitled the *RSA-911 report* submitted to the Rehabilitation Services Administration containing detailed client and employment data. MRC is currently developing a new case management and data system which will bring together both the Vocational Rehabilitation and Community Living programs and create a frontal facing portal for consumers and providers, and to also allow better integration of data between WIOA partners. This project is in development, and it is expected to be rolled out for the VR program during the *State Plan* period.

The **Massachusetts Commission for the Blind (MCB)** has a Management Information System known as Aware, which serves as the case management and data system for MCB's Vocational Rehabilitation Program. Data is tracked and managed at the client level for all MCB VR consumers. The system documents and covers all aspects of the VR process from referral to exit. The system has been modified to produce a quarterly data file entitled the *RSA-911 report* submitted to the Rehabilitation Services Administration containing detailed client and employment data. The system is also used to produce data for agency dashboards used for agency reporting and forecasting.

The **Department of Transitional Assistance (DTA)** within the Executive Office of Health and Human Services (EOHHS) administers the Temporary Assistance for Needy Families (TANF) work program, known as Pathway to Work, and the Supplemental Nutrition

Assistance Program (SNAP) Employment and Training Program, known as the SNAP Path to Work Program, through the BEACON case management and Partner Activity Tracking Hub (PATH) systems. MDCS and DTA operate an interface between BEACON and MOSES by which MDCS provides information on services that selected TANF and SNAP recipients (those identified as work ready) received at career centers. PATH is used by contracted SNAP E&T providers and career centers to enroll and manage SNAP Path to Work Program participation and for the submission, review and approval of budgets and claims.

The **Department of Unemployment Assistance (DUA)** within the Executive Office of Labor and Workforce Development administers the UI program in Massachusetts through its use of UI Online, a web-based system that serves as a self-service application used by both job seekers and employers to engage with DUA. DUA staff also uses UI Online to manage DUA's operations. DUA recently rolled out a new application for employers that has been well received and is continuing to work on upgrades to on-line services for claimants that are expected to be available in 2024.

State Policies

(2) The State policies that will support the implementation of the State's strategies (e.g., co-enrollment policies and universal intake processes). In addition, describe the State's process for developing guidelines for State-administered One-Stop partner programs' contributions to a One-Stop delivery system, including benchmarks, and its guidance to assist local boards, chief elected officials, and local One-Stop partners in determining equitable and stable methods of funding infrastructure in accordance with sec. 121(h)(l)(B). Beginning with the *State Plan* modification in 2018 and for subsequent *State Plans* and *State Plan* modifications, the State must also include such guidelines.

The MassHire JobQuest system serves as a universal intake process for job seekers.

Jobseekers are encouraged to register with MassHire JobQuest to become a MassHire Career Center member. To support a modernized workforce system, MassHire JobQuest has been upgraded with enhancements to provide a virtual set of career services to job seekers. Registration with MassHire JobQuest provides jobseekers with a first step toward a career path. *Massworkforce Issuance 100 DCS 08.121.1*: [MassHire Virtual Service Delivery Requirements mass.gov/doc/dcs-policy-08-121-2-masshire-virtual-service-delivery-requirements](https://mass.gov/doc/dcs-policy-08-121-2-masshire-virtual-service-delivery-requirements) issued to the MassHire Workforce System on January 24, 2023, provides guidance on the core set of virtual basic career services that must be made available to jobseekers.

The WIOA State Partners will continue to build on the collaborative efforts to jointly serve shared customers. The WIOA State Partners have agreed that youth and jobseekers who are eligible for and receive services from more than one WIOA Partner program are considered shared customers. Shared customers benefit from the services and resources delivered across multiple WIOA Partner programs and other stakeholders that are aligned to meet an individual's needs. Shared customers also meet the

definition in the Title II regulations of *WIOA*, *CFR 34 Part 463.3* of “concurrent enrollment or co-enrollment referring to enrollment by an eligible individual in two or more of the six core programs administered under the Act.” (Programs and Activities authorized by the Adult Education and Family Literacy Act (*Title II of WIOA*)).

MassHire Career Center staff follow [WIOA Joint Partner Communication 01.2018 mass.gov/doc/dcs-joint-partner-01-2018-wioa-partner-shared-customers](https://www.mass.gov/doc/dcs-joint-partner-01-2018-wioa-partner-shared-customers): WIOA Partner Shared Customers the purpose of enrolling shared customers into the MOSES data for tracking purposes. The tracking of shared customers is an important aspect of this strategy, not only for statistical measurement, but also to avoid duplication of service and to enable staff to better align services with the goals of the customer’s career plan.

Each State WIOA Partner has criteria that must be met before an individual is eligible for the respective Partner services. Communication among partners is essential to ensure accurate identification of shared customers.

WIOA Partners agree to meet the requirement to contribute to support both shared and infrastructure costs of the one-stop centers. The WIOA Core Partners have established Interagency Service Agreements (ISAs) to set forth the terms, conditions, and procedures under which contributions towards shared and infrastructure costs to support the one-stop centers will be provided. WIOA Partners follow [WIOA Joint Partner Communication 01.2023 FY23 mass.gov/doc/dcs-jpp-01-2023-fy23-wioa-state-partner-infrastructure-contributions](https://www.mass.gov/doc/dcs-jpp-01-2023-fy23-wioa-state-partner-infrastructure-contributions) WIOA State Partner Infrastructure Contributions for guidance on the contribution, utilization, tracking, and reporting of infrastructure funds.

To support effective partnership, WIOA State Partners, MassHire Workforce Boards, Local CEOs, and MassHire Career Center Management team continue to follow WIOA Joint Partner Communication 03.2021 Workforce Innovation Opportunity Act (WIOA) and Local Memorandum of Understanding (MOU) Guidance: [WIOA Joint Partner Communication 03.2021: Workforce Innovation and Opportunity Act \(WIOA\) Local Memorandum of Understanding \(MOU\) Guidance mass.gov/doc/dcs-jpp-03-2021-workforce-innovation-and-opportunity-act-wioa-local-memorandum-of-understanding/](https://www.mass.gov/doc/dcs-jpp-03-2021-workforce-innovation-and-opportunity-act-wioa-local-memorandum-of-understanding/)

Local WIOA Partners agree to:

1. Enter into a local MOU with the MassHire Workforce Board related to operation of the MassHire Career Center delivery system.
2. Participate in the operation of the MassHire Career Center delivery system consistent with the terms of this MOU, the requirements of WIOA, and the requirements of Federal laws authorizing the programs and activities.

3. Agree to serve Shared Customers and define how multiple providers, services and resources should support youth, job seekers, and businesses.
4. Utilize the MassHire Career Center Customer Flow and incorporate partner agency points of referral whether in-person or virtual to ensure accessibility and availability of programs and services for shared customers.
5. Ensure the effective use of modern tools and technology that enable shared customers to access needed services to complete program participation and achieve training and employment goals.
6. Develop a process for partner communication, referrals, enrollment, and sharing outcome information on shared customers to staff. And develop a process to review data on shared customers.
7. Use a portion of the funds available for programs and activities to maintain the MassHire Career Center delivery system, including infrastructure and shared costs of MassHire Career Centers, through methods agreed upon by the Local Board, Chief Elected Official, and Partners. If no consensus on methods is reached, the Governor, after consultation with the Chief Elected Official, Local Board, and State Board shall determine the portion of funds to be provided (WIOA sec. 121(a) (h) (1) (C)). 4
8. Provide representation on the Local Workforce Boards to the extent possible and/or participate in Local Board ad hoc activities/events or on standing committees.
9. Convene locally as an MOU Team at least quarterly and agree to the roles and responsibilities each Partner will have in the development of a diversity, equitable, and inclusive integrated service delivery strategy that meets the needs of customers and businesses.
10. The *MOU* will be reviewed, and if substantial changes have occurred, renewed, not less than once every 3-year period to ensure appropriate funding and delivery of services. The *MOU* must be updated to reflect any change in the MCC Partner infrastructure cost contributions.

All *Local MOUs* include the following language from the *State WIOA Partner MOU*:

“The Parties of this *MOU* agree that all required partners have a joint funding responsibility to support and maintain an effective local integrated service delivery system. In addition, all parties to the *MOU* recognize that shared and infrastructure costs are applicable to all required Partners. As such, all parties to this agreement acknowledge that the *Local MOU* herein serves the purpose of the infrastructure funding agreement (IFA) as required by WIOA. The infrastructure funding agreement as

described will be revisited on an annual basis and periodically reconciled against actual costs incurred and adjusted accordingly to ensure that it reflects a cost allocation methodology that demonstrates how infrastructure costs are charged in proportion to relative benefits received. Infrastructure funds are apportioned at the state level based on the percentage of shared customers served in each local workforce area. State Partners will establish a methodology that will ensure costs are allowable, reasonable, necessary, and allocable. As appropriate, State Partners will enter into Interagency Service Agreements (ISAs) or Contracts with the MassHire Department of Career Services (MDCS), as the designated State Workforce Agency (SWA), to issue the local allocations. Local Boards will ensure all allocations are incorporated into the local integrated budget during the annual planning process. MDCS will monitor the spending of all shared and infrastructure costs and local partners agree to meet regularly to discuss integrated service delivery strategies and the shared and infrastructure funds needed to actualize services. On an annual basis, local partners will provide suggestions and recommendations to state level partners for adjustments to shared and infrastructure funds allocated. The utilization of infrastructure funds will be reviewed quarterly.”

WIOA State and Local Partners agree that the most important activity within the local MOU process is the regular convening of local MOU teams to build new or build upon established relationships, refine services to shared customers and continually examine and improve customer flow within each of the MassHire Workforce System’s sixteen workforce areas. At the state level, Partners continue to work together to develop and/or adjust the formula for distribution of infrastructure funding based upon local data from each of the 16 workforce areas, identify expected outcomes to be locally achieved and determine a methodology for redistribution or reallocation of funds if performance expectations are not met or funds are underutilized.

WIOA Joint Partner communication 01.2023. FY23 WIOA State Partner Infrastructure Contributions and WIOA Joint Partner Communication 03.2021 *Local MOU Guidance* provides direction to local areas in determining equitable and stable methods of infrastructure costs.

3) State Program and State Board Overview

State Agency Organization

State Agency Organization. Describe the organization and delivery systems at the State and local levels for the programs covered in the plan, including the organizational structure. Include an organizational chart.

The Governor serves as the grant recipient for the Commonwealth. The Governor appoints most members of the MassHire State Workforce Board (State Board) [1] who

in conjunction with the Governor provide leadership across the workforce system to ensure businesses secure a skilled workforce. The Executive Office of Labor and Workforce Development (EOLWD), on behalf of the Governor oversees the MassHire Department of Career Services, the designated State Workforce Agency (SWA) that holds primary responsibility for oversight of the Massachusetts workforce development system.

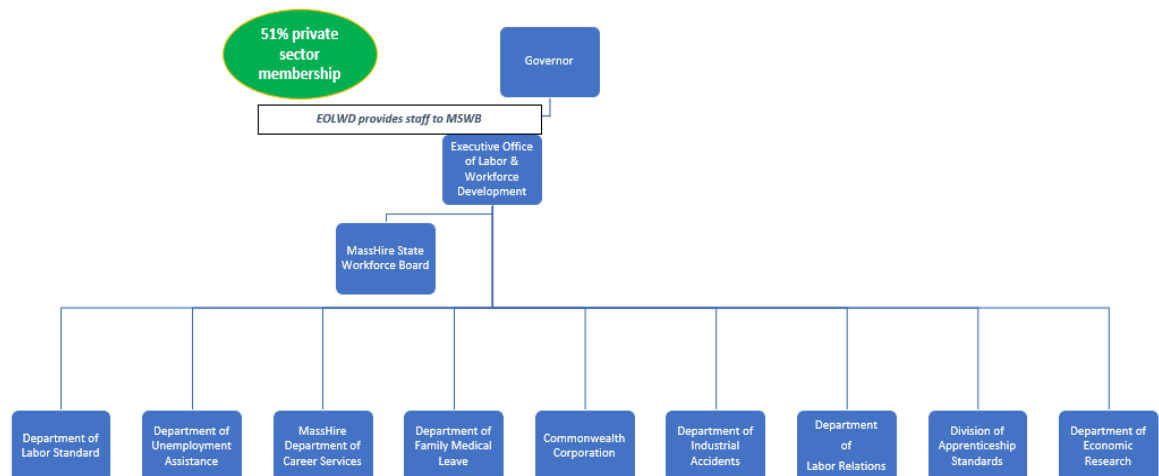
The Governor has designated 16 Workforce Development Areas and the Chief Elected Officials (CEO) within those areas to act as grant recipients.

MassHire Workforce Areas: Berkshire, Boston, Bristol, Brockton, Cape & Islands, Central Massachusetts, Franklin/Hampshire, Greater Lowell, Greater New Bedford, Hampden County, Merrimack Valley, Metro North, Metro South/West, North Central Massachusetts, North Shore, and South Shore

The Local CEOs appoint the business-driven MassHire Workforce Boards (Local Boards) that, in conjunction with the CEO, govern the system locally including 29 MassHire Career Centers (23 comprehensive centers, 2 youth-dedicated centers and 4 affiliate centers), ensuring coordination across all core partners, developing workforce strategies that meet the needs of businesses, as well as job seekers. Leadership from the State and Local Boards is strengthened by requiring core partners to be signatories on the statewide MOU.

Figure 49: Massachusetts Workforce System Governance Structure

Workforce System Governance



[1] Legislative members on the Massachusetts State Board are appointed by the presiding officer of their respective legislative chamber. All other State Board members are directly appointed by the Governor.

State Board

State Board. Provide a description of the State Board, including-Membership Roster. Provide a membership roster for the State Board, including members' organizational affiliations.

The MassHire State Workforce Board (MSWB) is a 33-member board that serves as an advisor to the Governor on building a strong workforce development system aligned with state education policies and economic development goals. The Board is charged with developing strategies that guide the Commonwealth's efforts in ensuring workers have the skills they need to fill the jobs businesses create, for a more prosperous Commonwealth, with higher wages for workers, larger profits for businesses, and stronger communities for all.

Membership roster: Provide a membership roster for the State Board, including members' organizational affiliations.

Governor

Sherry Dong, Director, Community Health Improvement Programs, Tufts Medical Center
Designee for Governor Maura Healey

Business and Industry Members

Joanne Pokaski- Chair, AVP, Workforce Planning and Development, Beth Israel Lahey Health

Jennifer Almeida, Director of Education, Mass Restaurant Association

George Atanasov, Head, Government Affairs Risk & Response, Worldwide Government Affairs & Policy, Johnson & Johnson

Kelly Aiken, Director of Workforce Development, UMass Memorial Health

Connie Cabello, Managing Director, Global Inclusion & Diversity, State Street Corporation

Megan Driscoll, Founder and CEO, Megan Driscoll Consulting

Jennifer Almeida, Director, of Education, Massachusetts Restaurant Association

Shawn Fitzpatrick, Senior Director of Manufacturing, WuXi Biologies

Rainer Gawlick, Board Member, Progress Software

Tara Kelly, Director, INSpire Cafe

Randall Lyons, Executive Director, Mass. Marine Trades Association

Nancy Luc, Executive Director, Building Pathways

Taylor Medeiros, Director - Learning & Culture, Encore Boston Harbor

Tonja Mettlach, Executive Vice President, Massachusetts Business Roundtable (MBR)

Radhames Nova, President and CEO, Junior Achievement of Greater Boston

Lisbeth Velez, CEO, LJV

Anna Yu, Former Executive Director, Artists for Humanity

Legislature

Representative Kip Diggs, Representative, Second Barnstable District, Massachusetts House of Representatives

Senator Jake Oliveira, Senator, Hampden, Hampshire, and Worcester District, Massachusetts Senate

Representatives of the Workforce Labor

Chrissy Lynch, Massachusetts AFL-CIO

John G. Mann, President, NAGE, Local 292

Apprenticeship

Elizabeth Skidmore, Liz Skidmore Consulting Business Representative/Organizer, North Atlantic States Regional Council of Carpenters

Community-Based Organizations

Derek Costa, Superintendent, Bristol County Agricultural High School

Dr. Pam Eddinger, President, Bunker Hill Community College

Maddrey Goode, Executive Director, New England Culinary Arts Training

Maria Ferreira-Bedard, Executive Director, Southeastern Mass SER-Jobs for Progress

Titles I and III Representative

Secretary Lauren Jones, Secretary, MA Executive Office of Labor and Workforce Development

Titles II Representative

Robert LePage, Assistant Secretary for Career Education, MA Executive Office of Education

Designee for MA Secretary of Education

Titles IV Representative

Patricia Yu, MA Executive Office of Health and Human Services

Chief Elected Officials

Paul Coogan, Mayor of Fall River

Joshua Garcia, Mayor of Holyoke

Other Representatives

Zenobia Moocchala, Undersecretary of Business Strategies, MA Executive Office of Economic Development

Toni Wolf, Commissioner, MassAbility

Board Activities. Provide a description of the activities that will assist State Board members and staff in carrying out State Board functions effectively.

In addition to quarterly meetings, the Board has modified its committee structure to ensure continued alignment with the Massachusetts Workforce Agenda. In addition to updating the MassHire Performance Committee to become the MassHire Performance and Accountability Committee and updating the Youth Pathways Committee to the Youth and Young Adult Pathways Committee, the Workforce Intelligence Committee was closed to enable the Board to better focus on state priorities and constitute both the Policy Committee and the MassHire Recognition Committee. The Policy committee drives MassHire policy initiatives and supports implementation of Board priority workforce strategies, helps pursue opportunities for innovation through strategic partnerships, and identifies methods to deliver efficient and aligned services across the MassHire system and the State Workforce Agenda. The MassHire Recognition Committee identifies best practices, individuals, and innovative collaborations across the Commonwealth that are making a difference in the lives and businesses across all Massachusetts regions.

The Board meets quarterly. During these meetings the Board is updated on and discusses high-level strategic priorities that foster continuous improvement of the workforce system, as well as considers activities and recommendations from one of the Board's committees. There are currently four committees of the Board:

MassHire Performance Committee (formerly the WIOA Oversight Committee): captures system-level performance data to drive decision-making and strategy; identifies and pursues opportunities to boost MassHire system performance, and provides general oversight of the MassHire system, including policies, programming, and development of the *WIOA State Plan*.

This MassHire Performance Committee is developing a performance dashboard for the workforce system, based on state-driven performance metrics. The Committee has also maintained responsibility for adjudicating appeals in the Career Center operator selection process and selecting winners of the MassHire Awards.

Workforce Intelligence Committee (formerly the Labor Market and Workforce Information Committee): supports the development of labor market information to stakeholders; drives MassHire toward using common and consistent labor market data; distills labor market information to support the MassHire State Workforce Board.

The Workforce Intelligence Committee produces a labor market and workforce information dashboard to update the Board on the Commonwealth's economy and workforce. The Committee also produces an industry and occupational "Deep Dive" on priority sectors in the Commonwealth.

Youth Pathways Committee: develops recommendations to enhance integrating programming and career pathways for youth; provides general oversight on the development and implementation of the *WIOA State Plan* youth goal.

Adult Pathways Committee: supports the integration of statewide workforce-related resources, programs, and initiatives to enhance career and economic outcomes for adult jobseeker customers; may be tasked with providing general oversight to MassHire initiatives that improve programs and resources for adult customers, including Apprenticeship Expansion.

(A) Assessment of Core Programs. Describe how the core programs will be assessed each year based on State performance accountability measures described in section 116(b) of WIOA. This State assessment must include the quality, effectiveness, and improvement of programs broken down by local area or provider. Such state assessments should take into account local and regional planning goals.

(B) Assessment of Partner Programs. Describe how other one-stop delivery system partner program services and *Combined State Plan* partner programs included in the plan will be assessed each year. Such assessments should take into account local and regional planning goals.

Assessment of Core Programs

The Administration supports enterprise-wide performance management as a tool for both process and outcome improvement. As such, the Administration embraces the federal Indicators of Performance, as well as the latitude afforded states to create their own distinct indicators stemming from WIOA. All Partner agencies have signed the SWIS Agreement and are able to access wage data from Massachusetts (through in-state agreements with the Department of Unemployment Assistance) and other states through SWIS.

Federally-Required WIOA Measures: All partners' federally funded programs are measured in the same way for these same outcomes. All measures are applied to participants in each WIOA primary funding stream by Partner agency. *Appendix 1* provides the Federal Performance Goals as required by all WIOA Partner Agencies. The chart below shows Federal performance for Program Year 2022 for each of the Partner funding streams.

Figure 50: Federal Indicators of Performance

FEDERAL INDICATORS OF PERFORMANCE

TWO YEAR UPDATE

Refer to *Career Center Performance Reports* developed and posted quarterly for the State and MassHire workforce areas. <https://www.mass.gov/info-details/fiscal-year-2025-ccpr>

Refer to *Program Year 2024 Annual Report* for state and local MassHire Workforce Area performance on the WIOA Federal measures. <https://www.mass.gov/doc/massachusetts-py2024-wioa-annual-performance-report-narrative-december-2025/download>

Federal Indicator of Performance	MDC Title I Adult	MDCS Title I Youth	MDCS Title I Dislocated Worker	MDCS Title III Wagner-Peyser	DESE/ ACLS Title II Adult Education	MRC Title IV Rehabilitation Services	MCB Title IV Rehabilitation Services
Employed 2nd Quarter After Exit	X	X	X	X	X	X	X
Employed 4th Quarter After Exit	X	X	X	X	X	X	X
Median Earnings 2nd Quarter After Exit	X	X	X	X	X	X	X
Credential Attainment Rate	X	X	X	NA	X	X	X
Measurable Skill Gains	X	X	X	NA	X	X	X
Effective in Serving Employers	X	X	X	X	X	X	X

Proposed Goals for the Federal Indicators of Performance are provided in *Appendix 1*.

Legend

- MDCS: MassHire Department of Career Services
- ACLS/DESE: Adult Career and Learning Services, Department of Elementary and Secondary Education
- MRC: Massachusetts Rehabilitation Commission
- MCB: Massachusetts Commission for the Blind

Massachusetts negotiates goals every two years with DOL/ETA. MDCS provides initial goals to ETA and comes to agreement in the last quarter of the Program Year (March to June). ETA employs a Statistical Adjustment Model to identify goal parameters for each two-year goal setting for each state. Massachusetts Proposed goals for Program Years 2024 and 2025 are entered in the Charts in *Appendix 1*.

MassHire Department of Career Services (MDCS) evaluates the performance of the MDCS workforce system quarterly and annually based upon negotiated local performance goals. As warranted, technical assistance and/or corrective action is provided based upon the result of the evaluations. Refer to the *Program Year 2021 Annual Performance Report* and FY2022 Career Center Performance Reports for **state and local MassHire Workforce Area performance on the WIOA Federal measures**.

The link to the *PY2021 WIOA Annual Performance Report* is found here: mass.gov/info-details/fiscal-year-2022-ccpr

[PY 2021 Annual Performance Report mass.gov/doc/ma-py2021-wioa-annual-report-december-2022-508-tagged-final-122922/](https://mass.gov/doc/ma-py2021-wioa-annual-report-december-2022-508-tagged-final-122922/)

The WIOA performance measures provide one strategy for assessing the quality of services provided by partner programs. Presented below are other key primary metrics shared by all WIOA partners.

Figure 51: Key Primary Metrics Shared by all WIOA Partners

Results for Key Populations State Designed Job Seeker Performance Measures Statewide Metrics	All MassHire Career Center Participants (WIOA Title I, III, Vets, TRADE, SCSEP, UI)	Adult Education Participants (WIOA Title II)	Vocational Rehabilitation Participants (WIOA Title IV)
Number and Percent of customers enrolled in training and employed in a training related job 2nd Quarter After Exit	Career Center customers enrolled in a training program	Title II individuals enrolled in a training program	Title IV individuals enrolled in a training program
Number and Percent of Veterans Employed 2nd Quarter After Exit	Career Center customers who self- declare Veterans	Title II individuals who self-declare Veterans status	Title IV individuals who self-declare Veterans status
Number and Percent of Individuals with Language Barriers at Registration Employed 2nd Quarter After Exit	Career Center customers who self- declare ESOL status	Title II individuals with ESOL status	Title IV individuals who self-declare ESOL status
Number and Percent of Individuals without High School Equivalency at enrollment that obtained a HS equivalency and who are Employed at 2nd Quarter After Exit	Career Center customers without HS Equivalency at intake (WIOA Title I, III, Vets, TRADE, etc.)	All Adult Education Participants (WIOA Title II)	All Vocational Rehabilitation Participants without HS Equivalency at intake (WIOA Title IV)
Number and Percent of Individuals with a Disability	Career Center customers who self- declare disability	Title II individuals who self-declare disability	Title IV individuals who self-declare disability

Results for Key Populations State Designed Job Seeker Performance Measures Statewide Metrics	All MassHire Career Center Participants (WIOA Title I, III, Vets, TRADE, SCSEP, UI)	Adult Education Participants (WIOA Title II)	Vocational Rehabilitation Participants (WIOA Title IV)
Employed 2nd Quarter After Exit			
Number and Percent of Individuals receiving TANF or SNAP Employed at 2nd Quarter After Exit	Career Center customers receiving TANF or SNAP required to enroll in job assistance services (WIOA Title I, III, Vets, TRADE, etc.)	All Adult Education Participants receiving TANF or SNAP (WIOA Title II)	All Vocational Rehabilitation Participants receiving TANF or SNAP (WIOA Title IV)
Number of Older Workers (50+) who were employed in the 2nd quarter after exit	Career Center customers 50+ years and SCSEP enrollees served at Career Centers	All Adult Education Participants 50+ years	All Vocational Rehabilitation Participants 50+ years
Number of New Businesses served	New business customers of Career Centers	NA	NA
Number and percent of Businesses registered with MassHire Career Centers that hired Customers referred by Career Centers	Career Center customers who were hired by businesses registered with Career Centers	NA	NA
Number and percent of Adults and Youth participating in Apprenticeship and Work-Based Learning (WBL) Programs	Career Center customers (Adults and Youth) in Apprenticeship or WBL Programs	Title II individuals enrolled in Apprenticeship or WBL Programs	Title IV individuals enrolled in Apprenticeship or WBL Programs
Number of Businesses sponsoring apprenticeship or WBL programs	Career Center Business Customers Sponsoring Apprenticeships or WBL Programs	NA	NA
Number of Shared Customers Across Partner Agencies	Career Center customers that are also receiving services from a Partner program	All Title II participants who are also receiving services at Career Centers	Title IV participants who are also receiving services at Career Centers

Previous Assessment Results

Previous Assessment Results. Beginning with the *State Plan* modification in 2018 and for subsequent *State Plans* and *State Plan* modifications, provide the results of an

assessment of the effectiveness of the core programs and other One-Stop partner programs and *Combined State Plan* partner program included in the plan during the preceding two-year period. Describe how the State is adapting its strategies based on these assessments. Describe how the state will conduct evaluations and research projects on activities under WIOA core programs; how such projects will be coordinated with, and designed in conjunction with, State, and local boards and with State agencies responsible for the administration of all respective core programs; and, further, how the projects will be coordinated with the evaluations provided for by the Secretary of Labor and the Secretary of Education under WIOA.

Please see <https://www.mass.gov/doc/massachusetts-py2024-wioa-annual-performance-report-narrative-december-2025/download> and <https://www.mass.gov/doc/massachusetts-py-2023-wioa-annual-performance-report-narrative-january-2025/download>

Program Year 2024 Performance	Employed 2nd Quarter After Exit	Employed 4th Quarter After Exit	Median Earnings 2nd Quarter After Exit	Credential Attainment Rate	Measurable Skill Gain
MDCS Title I Adult	73.5%	75.0%	7,900	68.0%	41.5%
MDCS Title I Youth	75.0%	72.0%	\$4,500	60.0%	45.0%
MDCS Title I Dislocated Worker	78.0%	81.0%	\$12,000	70.0%	45.0%
MDCS Title III Wagner Peyser ES	63.5%	67.0%	\$9,500	NA	NA

Program Year 2024 Performance	Employed 2d Quarter After Exit	Employed 4th Quarter after Exit	Median Earnings 2d Quarter After Exit	Credential Attainment Rate	Measurable Skill Gain
DESE/ACLS Title II Adult Education	43.65%	48.19%	\$7,917.68	27.27%	42.59%
MRC/MCB Title IV Rehabilitation Services*	56.1%	51.7%	\$5,304.32	26.5%	39.9%
Program Year 2023 Performance					
MDCS Title I Adult	79.0%	78.0%	\$6,400	73.5%	33.8%
MDCS Title I Youth	75.0%	72.0%	\$3,700	65.0%	45.0%
MDCS Title I Dislocated Worker	83.0%	74.4%	\$10,500	71.5%	45.5%
MDCS Title III Wagner Peyser Employment Service	63.0%	65.0%	\$8,100	NA	NA
DESE/ACLS Title II Adult Education	46.21%	46.42%	\$7,765.12	20.64%	40.93%

MRC / MCB Title IV Rehabilitation Services*	47.9%	51.2%	\$5,499.00	35.0%	19.6%

Combined Partner Measure (MDCS, MCB, MBY and ACLS)	PY 2024	PY 2023
Effectiveness in Serving Employers	Retention with Same Employer 2nd and 4th Quarters	Retention with Same Employer 2nd and 4th Quarters
Combined Partner Measure	68.8%	72.2%

The Massachusetts WIOA retention rate for effectiveness in serving employers across the partner agencies in Program Years 2024 and 2023 as described below. This is now a permanent measure used by all states.

The PY 2024 Retention Rate with the same employer in the second and fourth quarters after exit = 68.8%

Source: PY2024 Annual PIRL Report - including data provided by the partner agencies below:

- MassAbility
- Massachusetts Commission for the Blind (MCB)
- Adult and Community Learning Services (ACLS)
- MassHire Department of Career Services (MDCS)

Federally-Required WIOA Measures: All partners and their federally-funded programs are measured in the same way for these same outcomes. All measures are applied to participants in each WIOA primary funding stream by the Partner agency. *Appendix 1* provides the Federal Performance Goals as required by all WIOA Partner Agencies. The chart below shows Federal performance for Program Year 2022 and PY 2021 for each of the Partner funding streams.

Figure 52: PY 2022 and PY 2021 Federal Indicators of Performance

Program Year 2022 Performance	Employed 2nd Quarter After Exit	Employed 4th Quarter After Exit	Median Earnings 2nd Quarter After Exit	Credential Attainment Rate	Measurable Skill Gain
MDCS Title I Adult	72.0%	73.2%	\$8,106	66.2%	53.9%
MDCS Title I Youth	74.1%	70.0%	\$4,713	61.1%	57.6%
MDCS Title I Dislocated Worker	75.7%	79.9%	\$11,961	68.8%	49.1%

MDCS Title III Wagner Peyser Employment Service	65.0%	60.2%	\$9,341	NA	NA
DESE/ACLS Title II Adult Education	43.65%	48.19%	\$7,917.68	27.27%	42.59%
MRC/MCB Title IV Rehabilitation Services*	56.1%	51.7%	\$5,304.32	26.5%	39.9%
Program Year 2021 Performance					
MDCS Title I Adult	68.3%	67.4%	\$6,935	64.9%	33.8%
MDCS Title I Youth	69.5%	69.0%	\$3,881	55.6%	45.3%
MDCS Title I Dislocated Worker	77.5%	77.2%	\$12,059	66.0%	38.1%
MDCS Title III Wagner Peyser Employment Service	65.0%	60.2%	\$9,341	NA	NA
DESE/ACLS Title II Adult Education	46.21%	46.42%	\$7,765.12	20.64%	40.93%
MRC / MCB Title IV Rehabilitation Services*	47.9%	51.2%	\$5,499.00	35.0%	19.6%

*Note that MRC and MCB Title IV are combined for Federal Reporting purposes.

Figure 53: **Combined Partner Measure**

Combined Partner Measure (MDCS, MCB, MRC AND ACLS)	PY 2022	PY 2022	PY 2021	PY 2021
	Retention with Same Employer 2nd and 4th Quarters	Repeat Business Customers Rate	Retention with Same Employer 2nd and 4th Quarters	Repeat Business Customers Rate
EFFECTIVENESS IN SERVING EMPLOYERS				
Combined Partner Measure	84.5%	28.9%	84.7%	28.9%

The table below shows the percent of goal results for Program Year 2022 for WIOA Title I and Wagner-Peyser Employment Service.

Figure 54: **Program Year 2022 WIOA Title I and Wagner Peyser Percent of Goal Results**

Massachusetts				
Program Year 2022/Fiscal Year 2023				
Program	Performance Measure	Goal	Actual	% of Goal
Title I Adult	Q2 Entered Employment	79.0%	72.0%	91.1%
	Q4 Entered Employment	78.0%	73.2%	93.8%
	Q2 Median Wage	\$6,300	\$8,106	128.7%
	Credential Attainment	73.5%	66.2%	90.0%
	Measurable Skill Gain	40.0%	53.9%	134.8%

Title 1 Dislocated Worker	Q2 Entered Employment	83.0%	75.7%	91.2%
	Q4 Entered Employment	83.0%	79.9%	96.3%
	Q2 Median Wage	\$10,000	\$11,961	119.6%
	Credential Attainment	71.00%	68.8%	96.9%
	Measurable Skill Gain	45.0%	49.1%	109.0%
Title I Youth	Q2 Entered Employment	75.0%	74.1%	98.7%
	Q4 Entered Employment	72.0%	70.0%	97.2%
	Q2 Median Wage	\$3,600	\$4,713	130.9%
	Credential Attainment	65.0%	61.1%	94.1%
	Measurable Skill Gain	45.0%	57.6%	127.9%
Wagner-Peyser	Q2 Entered Employment	63.0%	65.0%	103.2%
	Q4 Entered Employment	65.0%	68.3%	105.1%
	Q2 Median Wage	\$8,000	\$9,776	122.2%

MassHire Department of Career Services (MDCS) evaluates the performance of the workforce system quarterly and annually based upon local workforce area performance goals negotiated with MassHire Workforce Boards. As warranted, technical assistance and/or corrective action is provided based upon the results of the evaluations.

Refer to *Career Center Performance Reports* developed and posted quarterly for the State and MassHire workforce areas. mass.gov/massworkforce-career-center-performance-reports-ccpr.

Refer to Program Year 2022 Annual Report for state and local MassHire Workforce Area performance on the WIOA Federal measures.

[PY 2022 \(WIOA\) Annual Performance Report mass.gov/doc/ma-py2022-wioa-annual-report-january-2024](https://mass.gov/doc/ma-py2022-wioa-annual-report-january-2024)

Evaluation

Evaluation: Describe how the state will conduct evaluations and research projects on activities under WIOA core programs; how such projects will be coordinated with, and designed in conjunction with, State and local boards and with State agencies responsible for the administration of all respective core programs; and, further, how the projects will be coordinated with the evaluations provided for by the Secretary of Labor and the Secretary of Education under WIOA.

The State may conduct evaluations and research projects with respect to the WIOA core programs in coordination with the MassHire State Workforce Board, local boards, and State partner agencies. These projects will include an evaluation component to be

conducted by an independent entity and be consistent with evaluation requirements established by the Secretary of Labor and the Secretary of Education under WIOA.

A state team comprising the Executive Office of Labor and Workforce Development/MassHire Department of Career Services (Title I and III), Adult Community Learning Services (Title II), Massachusetts Rehabilitation Commission (Title IV), Department of Transition (TANF/SNAP), the MassHire Hampden County Workforce Board, the MassHire Metro North Workforce Board, and Commonwealth Corporation will build off work accomplished toward development an evaluation agenda. A catalyst for this process involved participation in the Evaluation Peer Learning (EvalPLC) cohort hosted by the Department of Labor on July 26, 2023. The EvalPLC cohort provided technical assistance to state teams to assess readiness to design and conduct evaluations.

Participation in the EvalPLC cohort resulted in an evaluation action plan that identified areas of strength and focused areas of opportunity for improvement in evaluation. Through this process Massachusetts seeks to enhance the capacity to conduct evaluations.

The state team has also used participation in the EvalPLC cohort as an opportunity to focus on the development of a WIOA Evaluation Agenda. The WIOA Evaluation Agenda will guide the design and analyses of evaluations to review program impact and identify promising practices across WIOA Core Programs.

In a related development, Commonwealth Corporation has executed an agreement with the Massachusetts Department of Unemployment Assistance for access to wage record data. This access will allow for evaluations of the post-program outcomes of state supported YouthWorks and Workforce Competitiveness Trust Fund sectoral training by using wage record matching results combined with participant characteristics and program services data. This evaluation work will be coordinated with the agenda and, as there are shared WIOA customers in many of these programs, may suggest methods and approaches for WIOA evaluations as well.

Distribution of Funds for Core Programs

Distribution of Funds for Core Programs. Describe the methods and factors the State will use in distributing funds under the core programs in accordance with the provisions authorizing such distributions.

For Title I programs, provide a description of the written policies that establish the State's methods and factors used to distribute funds to local areas

The Executive Office of Labor and Workforce Development (EOLWD) established a forum for annual review of data used for WIOA Title I formula allocations through a Workforce Allocations Task Force established in 2014. The Task Force includes the Executive Director of the MassHire State Workforce Board (serving as the chair) and

representatives from local MassHire Workforce Boards, MassHire Career Centers, local Fiscal Officers, and staff at EOLWD's MassHire Department of Career Services (MDCS) who are responsible for development and distribution of WIOA Title I program allocations. The Task Force makes its recommendations to the Governor through the Secretary of Labor and Workforce Development. In addition, at the discretion of the Secretary, the Task Force may be called upon to recommend allocation methodologies for distribution of State funds appropriated for One-Stop Career Centers.

Each year, usually in the second calendar quarter, the U.S. Department of Labor, Employment and Training Administration publishes state program allotments in the Federal Register and issues an Advisory that includes the formula requirements for allocating funds to local workforce areas as defined in WIOA. The Federal Register and Training and Employment Guidance Advisory provide states with their WIOA State allotment levels for adult, dislocated worker and youth and the state allotment level for Wagner-Peyser Act Employment Services (ES).

MDCS is responsible for determining the WIOA Title I formula allocations for adult, dislocated worker, and youth for each of the 16 local workforce areas based on the formula data and methodology defined in WIOA. Workforce area allocation levels are provided to EOLWD's Finance Department. Local workforce area allocations are published annually, including detailed input data and formulas, through the annual Fiscal Year WIOA Local Annual Plan Guidance Policy and are updated as necessary during the fiscal year if there are changes in federal allotment levels that impact local workforce area allocations. MDCS also determines the Wagner-Peyser Employment Service program allocations for local workforce areas.

The chart below displays the PY2023/FY 2024 WIOA and Wagner-Peyser program funds allotted to Massachusetts and the funds distributed by formula to local workforce areas, reserved for statewide program activities, and reserved for Rapid Response services for laid-off workers and layoff aversion efforts for businesses.

PY2024/FY2025 Program	Total State Allotment	Workforce Areas	Statewide Programs	Rapid Response
Adult	\$16,243,206	\$13,806,725	\$2,436,481	
Youth	\$18,926,398	\$16,087,438	\$2,838,960	
Dislocated Worker	\$19,860,355	\$11,916,213	\$2,979,053	\$4,965,089
Wagner-Peyser	\$14,419,020	\$11,275,673	\$3,143,347	

PY2023/FY2024 Program	Total State Allotment	Workforce Areas	Statewide Programs	Rapid Response
Adult	\$18,040,385	\$15,334,327	\$2,706,058	

Youth	\$21,018,238	\$17,865,502	\$3,152,736	
Dislocated Worker	\$20,790,363	\$12,474,218	\$3,118,554	\$5,197,591
Wagner-Peyser	\$14,841,028	\$11,605,684	\$3,235,344	

Figure 55: Factors informing Title I Adult and Youth Formulas PY 2023

Adult: WIOA section 133(b)(2) or (b)(3)

Youth: WIOA section 128(b)(2) or (b)(3)

FACTOR/SOURCE	WEIGHT	TITLE I YOUTH	TITLE 1 ADULT
Average Number of Economically-Disadvantaged Youths (Census Bureau, American Community Survey)	1/3	X	
Average Number of Economically-Disadvantaged Adults (Census Bureau, American Community Survey)	1/3		X
Number of Unemployed in Areas of Substantial Unemployment (ASUs) (EOLWD/Department of Unemployment Assistance, Economic Research, BLS methodology)	1/3	X	X
Number of Excess Unemployed in Areas of Substantial Unemployment (ASUs) (EOLWD/Department of Unemployment Assistance, Economic Research, BLS methodology)	1/3	X	X

A hold-harmless provision ensures that each local area's percentage share of the State allotments designated for local WIOA Title I Youth and Adult program activities does not fall below 90% of the local area's average percentage share for the prior two fiscal years.

The Workforce Allocations Task Force reviews the formula for distribution of Title I Dislocated Worker funds to local workforce areas in accordance with the requirements in WIOA section 133(b)(2)(B) and makes its recommendations to the Governor through the Secretary of Labor and Workforce Development. This review is done annually to ensure that the most current data are used for the formula allocations to local workforce areas.

The Task Force's final recommendations for Program Year 2023/Fiscal Year 2024 are shown on the following table. The primary considerations for the Task Force with respect to the WIOA Title I Dislocated Worker formula are presented in the table below. The Task Force is working with the Department of Economic Research to develop a viable data source for the Plant Closing and Mass Layoff Data factor to replace the BLS Mass Layoff Statistics data used in prior years.

Figure 56: **Data Sources for Title I Dislocated Worker Formulas PY 2023**

WIOA 133(b)(2)

Required Information Element/Factor Program Year 2023	Data for PY23/FY24	Data Source	Factor Weight
Insured Unemployment Data	CY 2022 Average Monthly UI Claimants	UI Claimant Data Dept. of Economic Research	27.78%
Unemployment Concentrations	CY 2022 Average Annual Unemployment Rate	Labor Force Data Dept. of Economic Research	27.78%
Plant Closing and Mass Layoff Data	CY 2022 UI Claimants in Layoffs of 25+	UI Claimant Data Dept. of Economic Research	0%
Declining Industries Data	3-Year Job Loss in Declining Industries	Quarterly Census of Employment and Wages (QCEW) Dept. of Economic Research	11.10%
Farmer-Rancher Economic Hardship Data	Not a significant economic factor in MA at 0.24% of total employment	NA	NA
Long-Term Unemployment Data	CY 2022 Average Long-Term UI Claimants (26+ Continuous Weeks)	UI Claimant Data Dept. of Economic Research	16.67%
Long-Term Unemployment Data	CY 2022 Annual Total of UI Claimants Exhausting Benefits	UI Claimant Data Dept. of Economic Research	16.67%

A hold-harmless provision ensures that each local workforce area's percentage share of the State allotment designated for local Dislocated Worker program activities does not fall below 90% of the local workforce area's average percentage share for the prior two fiscal years.

Wagner-Peyser Employment

Service Program Allocations

Massachusetts has not changed its distribution formula since 2024. For 2025 allocations, see <https://www.mass.gov/doc/dcs-policy-04-114-04-114s-overview-of-wioa-and-wagner-peyser-allocations/download>.

WIOA and Wagner-Peyser legislation do not mandate any specific formula distribution from state-to-local workforce areas. However, state-to-local Wagner-Peyser allocations in the Commonwealth have by precedent been based on the federal-to-state formula. In PY23/FY24, of the \$14,841,028 received for Wagner-Peyser, 78.2% or \$11,605,686 was distributed to local workforce areas, and 21.8% (\$3,235,344) was reserved for statewide activities.

Refer to the summary for Fiscal Year 2024 at the link below for additional information.
[Overview of WIOA and Wagner-Peyser Allocations FY24 mass.gov/doc/dcs-policy-04-113s-overview-of-wioa-and-wagner-peyser-allocations-fy24/](https://mass.gov/doc/dcs-policy-04-113s-overview-of-wioa-and-wagner-peyser-allocations-fy24/)

Title II

For Title II:

- (i) Describe how the eligible agency will award multi-year grants or contracts on a competitive basis to eligible providers in the State, including how eligible agencies will establish that eligible providers are organizations of demonstrated effectiveness.
- (ii) Describe how the eligible agency will ensure direct and equitable access to all eligible providers to apply and compete for funds and how the eligible agency will ensure that it is using the same grant or contract announcement and application procedure for all eligible providers.

Massachusetts awarded grants and/or contracts in compliance with 34 CFR part 463, Subpart C. The allocation estimates per workforce areas were set based on two data-based considerations: adult educational need determined by the 2020 American Community Survey (40%) combined with the Social Vulnerability Index (10%); and demand for adult education derived from DESE/ACLS FY22 enrollment (40%) and waitlist data (10%), after holding all regions.

Open and Competitive Request for Proposals

The application process used for adult education funds is uniform to ensure a standardized approach to the review of proposals and awarding of funds. RFPs are advertised on social media, the state website, and the procurement site and via notifications sent out through department mailings. All current providers and other potential applicants that request information prior to the announcement receive information on the same day as the social media notice.

All eligible applicants go through the same application and review process and have direct and equitable access to apply and compete for title II grants and contracts, including WIOA Sections 225 (Corrections), 231 (Grants) and 243 (IEL/Civics).

ACLS completed a rebid of all services in PY22 for a new five (5) year funding cycle starting in PY23 through an open and competitive Request for Proposals (RFP) and Request for Responses (RFR). Massachusetts distributed AEFLA funds to provide adult education and literacy services

in all 16 workforce regions of the Commonwealth. The RFP was broadly disseminated to ensure direct and equitable access to eligible providers. The state trained proposal review teams comprised of state adult education staff, local workforce development board (LWDB) staff, and consultants as needed. In collaboration with the LWDB directors, ACLS developed a separate process for LWDB review of proposals for alignment with local plans.

The *Open and Competitive Request for Proposals (RFP)* process consisted of two separate competitive processes.

A regional competition made funding available for Community Adult Learning Centers (CALCs) offering ABE and/or ESOL services, which may also include family literacy services. The regional allocations were determined using a formula that considers data from the American Community Survey. Successful applicants were awarded funding based on the quality of their responses to the 13 considerations in Title II of WIOA. They were also awarded points based on past performance. The regional competition was reviewed for alignment with local plans by local boards.

A statewide competition made funding available for programs that may include adult education in correctional institutions (AECI), workplace education, MassSTEP (IET/ IELCE) and a virtual adult education academy, MassLinks. Applicants competed for funds based on a statewide allocation and were awarded funding based on the quality of their responses to the 13 considerations in Title II of WIOA without regard to the workforce regions in which they are located.

Funds must be used in accordance with [FY24-FY28 Massachusetts Policies for Effective Adult Education in Community Adult Learning Centers and Correctional Institutions](#) doe.mass.edu/acls/abeprogram/ to provide adult education to eligible students; eligible students are:

- are at least 16 years of age;
- are not enrolled or required to be enrolled in secondary school under state law; and
- do not have a secondary school diploma or its recognized equivalent and have not achieved an equivalent level of education; or are basic skills deficient; or are English language learners.

ACLS funded the following services for the PY23-PY27 funding cycle:

- Eighty (80) Community Adult Learning Centers (CALCs) offering ESOL and/or ABE services.
- Six (6) MassSTEP ABE providers offering adult education (AE) concurrently and contextually with workforce preparation activities and workforce training to accelerate learning outcomes, including student attainment of a high school credential and one or more relevant industry-recognized credentials (IRCs). A comprehensive list of MassSTEP ABE services and types of funded programs can be found on the [MassSTEP website](https://doe.mass.edu/acls/MassSTEP/default.html) doe.mass.edu/acls/MassSTEP/default.html

- Two (2) workplace education programs offering instructional services at a workplace for eligible adults (incumbent workers) in basic reading, writing and numeracy, pre-adult secondary (Pre-ASE), and adult secondary education (ASE) including preparation for high school equivalency certification. English for Speakers of other languages (ESOL) instruction may also be provided for limited-English proficient adults. Instructional services are provided through partnerships among businesses, labor organizations, and adult education providers. Projects are supported with a combination of primarily state and local matching resources for up to three years.
- One (1) statewide virtual adult education academy [MassLinks](https://doe.mass.edu/acls/MassLINKS/default.html) doe.mass.edu/acls/MassLINKS/default.html offering online High School Equivalency (GED and HiSet) preparation classes or English for Speakers of Other Languages (ESOL/ESL) classes.

DESE adult education CALC awards included average monthly enrollment targets and a cost per participant. The cost per participant is the base award (i.e., excluding Outstationing and MassSTEP) divided by the monthly enrollment target. Grantees are expected to maintain or exceed, on average, their enrollment target(s) from September through May. See the [FY24-FY28 Massachusetts Policies for Effective Adult Education in Community Adult Learning Centers and Correctional Institutions](https://doe.mass.edu/acls/abeprogram/) doe.mass.edu/acls/abeprogram/ for additional information.

Grantees must maintain the negotiated average monthly enrollment during the program year. In PY22-23, using federal and state funds, the AE system served:

Figure 57: Number of Student served by Adult Education System

Category	Number of Students
ABE (GED/HiSet)/ESOL	5,951/16,157
Men/Women	7,661/14,447
Employed/Unemployed	11,421/7,540
Out-of-School Youth	3,350
In correctional institutions	1,341
Receiving public assistance	9,013
Parents with dependents <18	1,376

The Department of Elementary and Secondary Education, Adult Community Learning Services Unit followed the timeline below for implementing the *PY23 Open and Competitive Request for Proposals (RFP)*:

Dates	Events
July 2022	RFP is posted at doe.mass.edu/Grants and ACLS Funding Opportunities doe.mass.edu/acls/rfp/
September 2022	Bidders' Virtual Conferences Thursday, September 8, 2022, 10:00 a.m. - 12:00 p.m. Friday, September 9, 2022, 1:00 p.m. - 3:00 p.m.

September 2022	Submit an optional Letter of Intent (for planning purposes only, but strongly encouraged) in the letter of intent portal https://webportalapp.com/webform/fy2428_letterofintent by Friday, September 30, 2022.
July - October 2022	All inquiries must be submitted in writing to question portal . https://webportalapp.com/webform/fy2428rfpquestion . Q&A with answers to inquiries will be posted to ACLS Funding Opportunities doe.mass.edu/acls/rfp/ on the ACLS website. The deadline for applicant submission of questions is Friday, October 7, 2022. Requests for assistance with submitting inquiries or locating the Questions may be directed to the ACLS receptionist at (781) 338-3850.
October 24, 2022	Grant application must be submitted before or on Monday, October 24, 2022, by 5:00 p.m. in the RFP submission portal . https://webportalapp.com/appform/login/fy2428rfp
November – December 2022	Applications will be reviewed, including a review by local workforce development boards for alignment with local plans.
December 2022/ January 2023	Notice of Intent to Award (the initial posting of successful applicants is posted here . oe.mass.edu/acls/rfp/ae-rfp.aspx This notification is not the final list of grantees. The final list will be posted to the ACLS and Grants websites when all data is verified, and appeals are decided. Applicants should not obligate funds based on this list. Applicants receive award letters with instructions on how and what information to enter in GEM\$. Agency review of award decisions must be submitted within 30 days of the <i>Notice of Intent to Award</i> issued by ACLS. Requests for appeals should be submitted in writing to the Commissioner's Office.

Title IV

Title IV Vocational Rehabilitation

In the case of a State that, under section 101(a)(2)(A)(i) of the Rehabilitation Act designates a State agency to administer the part of the Vocational Rehabilitation (VR) services portion of the Unified or *Combined State Plan* under which VR services are provided for individuals who are blind, describe the process and the factors used by the State to determine the distribution of funds among the two VR agencies in the State.

Consistent with the formula, MassAbility continued to receive 85% of Massachusetts' VR funding; MCB continued to receive 15%.

By formula, 85% of Massachusetts's VR funding goes to the Massachusetts Rehabilitation Commission (MRC) and 15% of the VR funding goes to the Massachusetts Commission for the Blind (MCB).

MRC makes funds for needed services available to any eligible consumer without regard to location within the state.

Massachusetts Commission for the Blind allots vocational rehabilitation funds to local offices as necessary throughout the year, the agency's currently and funds for needed services are made available to any eligible consumer without regard to location within the state.

Program Data

Data Alignment and Integration

Data Alignment and Integration. Describe the plans of the lead State agencies with responsibility for the administration of the core programs, along with the State Board, to align and integrate available workforce and education data systems for the core programs, unemployment insurance programs, and education through postsecondary education, and to the extent possible, the *Combined State Plan* partner programs included in this plan. The description of the *State's Plan* for integrating data systems should include the State's goals for achieving integration and any progress to date.

- (i) Describe the State's plans to make the management information systems for the core programs interoperable to maximize the efficient exchange of common data elements to support assessment and evaluation.
- (ii) Describe the State's plans to integrate data systems to facilitate streamlined intake and service delivery to track participation across all programs included in this plan.
- (iii) Explain how the State board will assist the governor in aligning technology and data systems across mandatory One-Stop partner programs (including design and implementation of common intake, data collection, etc.) and how such alignment will improve service delivery to individuals, including unemployed individuals.
- (iv) Describe the State's plans to develop and produce the reports required under section 116, performance accountability system. (WIOA section 116(d)(2)).

1. Describe the State's plans to make the management information systems for the core programs interoperable to maximize the efficient exchange of common data elements to support assessment and evaluation.

Ensuring that Massachusetts has a world-class workforce system by integrating the use of modern tools and techniques is a primary goal over the next four years. This will be accomplished through the adoption of a technological infrastructure across workforce partners to track activity, services, and outcomes of shared customers. The development of an integrated data system between unemployment insurance (currently UI Online) and MassHire/Workforce Connect (currently MOSES and associated

applications) is a critical step to achievement. These changes are driven by the need to increase the availability and delivery of virtual workforce services (e.g., career exploration, virtual job fairs, skill development tutorials, etc.) and provide first class connectivity between job seekers and businesses. Toward this end EOLWD has engaged a multi-faceted process to initiate needed changes: strategically redesign business processes and prioritize interim solutions that support current systems and build capacity; design a future customer-focused streamlined technology architecture that considers commercial solutions that meet needs; and create a comprehensive data management strategy to include a transition to a new system/platform.

The capacity of the Commonwealth's workforce system will be augmented by aligning programs, services, and activities across WIOA core partners. This requires a common intake/registration application with real-time triage processes that will strengthen the consistency and quality of services provided by the system to job seekers and businesses. Massachusetts is currently developing an RFP for a MOSES replacement system that will feature a single sign-on, a job seeker dashboard with the capability for partners to share information with their customers, and a case management dashboard that will permit case managers to view selective customer information with partner case managers for comprehensive service provision.

MassHire currently uses MassHire JobQuest, an online application that connects to the MOSES database and is the front-facing web application used by members of the public (job seekers and businesses) to access programs and services such as job search and application, training programs research and, for employers, to locate job candidates. JobQuest serves as a portal to register individuals working with WIOA Program partners who will be co-enrolled in the MassHire system for career development, job search, educational and occupational assessments, occupational training, and job placement. The new IT system functionality will allow all program partners to easily register individuals at MassHire Career Centers, track referrals and track the service results for those "shared" customers.

2. Describe the State's plans to integrate data systems to facilitate streamlined intake and service delivery to track participation across all programs included in this plan.

Please refer to response to #1 above.

3. Explain how the State board will assist the governor in aligning technology and data systems across required one-stop partner programs (including design and implementation of common intake, data collection, etc.) and how such alignment will improve service delivery to individuals, including unemployed individuals.

A primary goal for the workforce system is to modernize the system and ensure that Massachusetts has a world-class workforce system by integrating the use of modern tools and techniques.

- Safeguard the integrity of the system by enhancing security and reliability.
- Adopt a technological system across workforce partners that can track activity, services, and outcomes of shared customers (job seeker and businesses) – e.g., Learn to Earn DULA, P20 data system etc.
- Develop integrated data system between unemployment insurance (UI Online, currently undergoing transformation) and MassHire (MOSES) that accelerates progression from job loss to job gain.
- Continue to expand upon availability and quality of delivery of virtual workforce services (e.g., career exploration, virtual job fairs, skill development, etc.).
- Implement an applicant tracking system that will enhance matching and connectivity between job seekers and job openings.

The MassHire State Workforce Board’s Workforce System Modernization subcommittee will provide oversight and guidance to the development, integration and deployment of the workforce IT system and ensures that the workforce IT system leverages modern tools, technologies, user-interface techniques, governance, and program management.

Modernization Subcommittee

Projects:

Assist the Secretary in implementing a statewide project to address cliff effects, initiated with a pilot to reform benefit disincentives and provide economic mobility for participants.

Provide thought leadership on the replacement of the Massachusetts One Step Employment System.

4. Describe the State’s plans to develop and produce the reports required under section 116, performance accountability system. (WIOA section 116(d)(2)).

The MassHire Department of Career Services is responsible for coordinating production of the *Annual Performance Report*, the contents of which are described below and to be submitted per required report formats.

The State commits to performance reports that adhere to the requirements described under section 116, moreover, the reports will include a mechanism for electronic access to the State local area and ETP performance reports. The state submits the required data described below through the *PIRL report*.

WIOA Section 116(d)(2): *Performance Reports* – Required report content for core programs:

(2) Contents of state performance reports. – The performance report for a State shall include [subject to Data Validation] —

(A) information specifying the levels of performance achieved with respect to the primary indicators of performance described in subsection for each of the programs described in subsection (b)(3)(A)(ii) and the State-adjusted levels of performance with respect to such indicators for each program;

(B) information specifying the levels of performance achieved with respect to the primary indicators of performance described in subsection (b)(2)(A) for each of the programs described in subsection (b)(3)(A)(ii) with respect to individuals with barriers to employment, disaggregated by each subpopulation of such individuals, and by race, ethnicity, sex, and age;

(C) the total number of participants served by each of the programs described in subsection (b)(3)(A)(ii);

(D) the number of participants who received career and training services, respectively, during the most recent program year and the three preceding program years, and the amount of funds spent on each type of service;

(E) the number of participants who exited from career and training services, respectively, during the most recent program year and the 3 preceding program years;

(F) the average cost per participant of those participants who received career and training services, respectively, during the most recent program year and the 3 preceding program years;

(G) the percentage of participants in a program authorized under this subtitle who received training services and obtained unsubsidized employment in a field related to the training received;

(H) the number of individuals with barriers to employment served by each of the programs described in subsection (b)(3)(A)(ii), disaggregated by each subpopulation of such individuals;

(I) the number of participants who are enrolled in more than 1 of the programs described in subsection (b)(3)(A)(ii);

(J) the percentage of the State's annual allotment under section 132(b) that the State spent on administrative costs;

(K) in the case of a State in which local areas are implementing pay-for-performance contract strategies for programs--

(i) the performance of service providers entering into contracts for such strategies, measure against the levels of performance specified in the contracts for such strategies; and

(ii) an evaluation of the design of the programs and performance of the strategies,

and, where possible, the level of satisfaction with the strategies among employers and participants benefitting from the strategies; and

(L) other information that facilitates comparisons of programs with programs in other states.

Assessment of Participants' Post-Program Success

Assessment of Participants' Post-Program Success. Describe how lead State agencies will use the workforce development system to assess the progress of participants who are exiting from core programs in entering, persisting in, and completing postsecondary education, or entering or remaining in employment. States may choose to set additional indicators of performance.

Massachusetts has a long-term goal of development of a longitudinal follow-up capability on participant employment using wage record data and completion of education and attainment of degrees by use of higher education data. However, this capacity will not be pursued until more immediate data exchange and required performance reporting are in place for all core workforce partner agencies.

Massachusetts will be using results from wage record matches of program exiters/completers on the required measures that assess employment, earnings, and persistence in employment for one year following exit for the core WIOA programs. We will similarly follow up for the year following exit for program participants that entered training or postsecondary education as part of their program services. The state is pursuing an interface with core partner systems that will also provide information on shared customers and partner services.

Use of Unemployment Insurance (UI) Wage Record Data

Use of Unemployment Insurance (UI) Wage Record Data. Explain how the State will meet the requirements to utilize quarterly UI wage records for performance accountability, evaluations, and as a source for workforce and labor market information, consistent with Federal and State law. (This Operational Planning element applies to core programs.)

Based upon the WIOA requirements to utilize wage record data for performance review and evaluation, EOLWD led a process with the Department of Unemployment Assistance (DUA) to discuss WIOA wage record matching needs of partner agencies and to design MOUs with the partners to match wage records of Core Program Partner participants to develop baseline data for the *WIOA Plan*. The Massachusetts Workforce Board, EOLWD, and DUA will work with each of the Core Program partners to continue

to meet performance accountability reporting requirements. Specific *MOUs* for ongoing wage matching are in place.

The Massachusetts Rehabilitation Commission (MRC) and the Massachusetts Commission for the Blind (MCB) each worked with EOLWD, Massachusetts Adult and Community Learning Services, and DUA to initiate a *Memorandum of Understanding (MOU)* and data sharing agreement for MRC, MCB and DESE to obtain client-specific UI wage data records for the purposes of WIOA reporting and to measure progress on the *Common Performance Measures*.

Under WIOA, the MRC is required to report VR data to the Rehabilitation Services Administration (RSA) through the *RSA-911 report* which will be submitted via the RSA portal on a quarterly basis with open and closed case data. As part of its WIOA reporting process to report data and to measure performance on the Common Measures to RSA, MRC requires individual level wage data from Unemployment Insurance data. MRC reports data for consumers exiting from the Vocational Rehabilitation Program both successfully and unsuccessfully at the 1st, 2nd, 3rd, and 4th quarter after exit from the VR program for the following fields from Unemployment Insurance data from DUA based on Social Security Numbers provided by MRC to DUA using a secure interchange method of data transmission.

Data fields to be provided to MRC from DUA for matching records using an interchange secure data transmission system will be as follows:

- Unemployment Insurance Quarterly Earnings (at 1st, 2nd, 3rd, and 4th quarter after exit)
- Employer Name (at 1st, 2nd, 3rd, and 4th quarter after exit)
- Federal Employer Identification Number (FEIN) (at 1st, 2nd, 3rd, and 4th quarter after exit)
- Matching Quarter
- NAICS Code (4 digits)

MRC requires a record for each matching client with individual earnings per employer.

The MOU agreement ensures adequate time for MRC staff to test the process for scripting this data into the RSA-911 report prior to the first quarterly submission as required by the final rules and regulations of the revised RSA-911 file. MRC will use the MRCIS case-management system to submit the RSA-911 data file to the RSA portal on a quarterly program schedule.

MCB and DESE receive similar information from DUA under MOUs entered into with those agencies.

All Massachusetts core partner agencies participate in the State Wage Interchange System (SWIS) clearinghouse to obtain employment wage data from other states to supplement wage data provided by DUA.

Privacy Safeguards

Privacy Safeguards. Describe the privacy safeguards incorporated in the State's workforce development system, including safeguards required by section 444 of the General Education Provisions Act (20 U.S.C. 1232g) and other applicable Federal laws.

All Federal and State laws and provisions concerning the privacy of personal and business information for all partners are strictly adhered to and protocols are in place to monitor all partners' access to, and use of participant and employer data required to fulfill their programmatic requirements.

As such, the Commonwealth and its workforce development partners are subject to and must comply with all applicable federal and state regulatory and statutory requirements, and any amendment thereto, pertaining to confidentiality and privacy, including but not limited to: General Laws Chapter 151A, §46 ; General Laws Chapter 23H, §6(b)); Fair Information Practices Act (G.L c. 66A); General Laws Chapter 214, §3B; General Laws Chapter 93H, § 2; General Laws Chapter 151A, § 14P; and Internal Revenue Code 6103 and 801 C.M.R. 3.00 et seq. In addition, the Commonwealth and its workforce development partners must comply with the notification requirements of M.G.L. c. 93H (Security Breaches) and *Executive Order Number 504 (Order Regarding the Security and Confidentiality of Personal Information)*, and *Executive Order 526, Non-Discrimination Policy*, including any supplemental procedures or regulations thereto. MDCS gives training to all its staff and partner staff on safeguarding personal and business information, and all MDCS staff and partners must sign off on the *EOLWD Confidentiality Policy and EOLWD Information Technology Resources Policy*.

(Workforce Issuance Number 100-DCS-03-109) Mass Identity Theft Legislation
mass.gov/doc/dcs-policy-03-109-massachusetts-identity-theft-legislation and

(Workforce Issuance No. 100-DCS-03-106) Policy to Protect Confidential Information
mass.gov/doc/confidentiality-for-eolwd-and-non-eolwd-employees-contractors

Priority of Service for Veterans

Priority of Service for Veterans. Describe how the State will implement and monitor the priority of service provisions for Veterans in accordance with the requirements of the Jobs for Veterans Act, codified at section 4215 of 38 U.S.C., which applies to all employment and training programs funded in whole or in part by the Department of Labor. States should also describe the referral process for Veterans determined to have a significant barrier to employment to receive services from the Jobs for Veterans State Grants (JVSG) program's Disabled Veterans' Outreach Program (DVOP) specialist.

Massachusetts has established policies for the delivery of priority of service for Veterans and eligible spouses by the state workforce agency or agencies, MassHire Workforce Boards and MassHire Career Centers for all qualified job-training programs delivered through the Commonwealth's workforce system. The policies:

- Ensure that covered persons are identified at the point of entry and given an opportunity to take full advantage of priority of service.
- Ensure that covered persons are aware of a) their entitlement to priority of service; b) the full array of employment, training, and placement services available under priority of service; and c) any applicable eligibility requirements for those programs and/ or services.
- Require MassHire Workforce Boards to develop and include policies in their local plan to implement priority of service for the MassHire Career Centers (MCC) and for service delivery by local workforce preparation and training providers.

The MCCs are fully and seamlessly integrated with the full array of WIOA, Wagner-Peyser and other key workforce partner services co-located under one roof. The goal is to as quickly as possible, deliver the desired and appropriate services.

Recipients and sub recipients of DOL funds are required to provide Priority of Service to Veterans and eligible spouses. Agreement of a program operator to implement priority of service is a condition of receipt of DOL funds. Priority of Service to Veterans applies to all WIOA Wagner-Peyser Title III funded activities including technology assisted activities, Senior Community Service Employment Program (SCSEP), Indian and Native American Programs (INAP), National Farmworker Job Training Programs (NFJP), Trade Adjustment Assistance Programs (TAA), job training programs funded by the Women's Bureau, and other current or future qualified job-training program.

For the purposes of eligibility for priority of service, the broad definition of Veteran under 38 USC 101(2) applies. To be eligible for priority of service the term Veteran means a person who served at least one day of active duty (other than active duty for training) and was discharged or released under other than dishonorable conditions, under 38 USC 101(2). Eligible spouse is defined under 38 USC 101(2) applies to any Veteran who died of a service-connected disability, has a total 100% service-connected disability; is missing in action or captured or detained in the line of duty. Veterans and eligible spouses eligible for priority of service are referred to as covered persons; while those not eligible for priority of service are referred to as non-covered persons.

Priority of service means that Veterans and eligible spouses are given priority over non-covered persons for the receipt of employment, training, and placement services provided under a qualified job-training program. Priority means that a covered person is entitled to precedence over non-covered persons for services. This means that a covered person receives access to services before a non-covered person, and if resources are limited instead of a non-covered person.

All operators must enable covered persons to identify themselves at point of entry through a user-friendly process, such as our online Massachusetts JobQuest registration. During any registration process, all customers are prompted by staff to determine if they or their spouse has ever served in the United States Military. Once the Veteran or eligible spouse has been identified as a covered person, they must be made aware of their entitlement to priority of service, and subsequently informed of the full array of employment, training, and placement services and the eligibility requirements for those programs and services.

Verification of covered persons is not necessary or desired at point of entry to provide priority of service unless the covered person is to immediately undergo eligibility determination and become registered or enrolled into a specific program and the applicable federal rules require verification of Veteran status at that time. Veterans and covered persons are encouraged to identify themselves through self-attestation at all points of entry.

All customers who enter at the Point of Entry (Front Desk) Area will be asked if they have “served in the U.S. Military or are a military spouse”. If the customer answers “Yes”, or (before asked) informs front desk staff that they are a Service member or Eligible Spouse; they are immediately eligible for POS and must be informed of that fact.

When a customer self-identifies as a (Prior) Service Member; front line staff or representative will review the *Veterans’ and Eligible Spouses* designated Career Center *Triage Form* with them to complete and start initial assessment. Upon determination of eligible status for Jobs for Veterans State Grant Programs services, a referral will be made to Disability Veteran Outreach Program specialist (DVOP) for a comprehensive assessment and individualized career services.

Note: If Service Member is determined “not eligible”, referral will be made to Career Center Representative for Employment Services.

Prioritizing services to the targeted Veterans with Significant Barriers to Employment (SBE) is facilitated by specifically “flagging” such “at risk” Veteran customers within the Massachusetts One Stop Employment System (MOSES) database. The initial assessment identifies the individual’s “job readiness”. If the Veteran is not identified as having an SBE, services are provided on a “priority” basis by MCC staff. If individual career services are appropriate, a case plan is developed and the Veteran is assisted directly by the DVOP or referred to supportive services, as appropriate.

For those programs with statutory priorities that require preference to be given to a particular group, covered persons who meet those statutory requirements receive the

highest priority for the program or services; while covered persons receive the highest priority for programs or services without any discretionary targets. (Covered persons who are Veterans receive the highest priority.)

Monitoring of Priority of Service is a shared responsibility with each local area, career center, and multiple program operators. The MassHire Department of Career Services (MDCS) places genuine emphasis on priority of services to Veterans through routine leadership visits, periodic staff training, and scheduled Field Management and Oversight (FMO) WIOA program monitoring. Priority of service elements are incorporated in the MDCS monitoring process. In conjunction with MDCS, Department of Labor Veterans Employment and Training Service, (DOL/VETS) periodically conducts site visits to ensure signage is posted and career center staff understand the requirements and implementation of priority of service.

Addressing the Accessibility of the One-Stop Delivery System

Addressing the Accessibility of the One-Stop Delivery System for individuals with disabilities.

Describe how the One-Stop delivery system (including One-Stop Career Center operators and the One-Stop delivery system partners), will comply with section 188 of WIOA (if applicable) and applicable provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.) with regard to the physical and programmatic accessibility of facilities, programs, services, technology, and materials for individuals with disabilities. This also must include a description of compliance through providing staff training and support for addressing the needs of individuals with disabilities. Describe the State's One-Stop Career Center certification policy, particularly the accessibility criteria. (This Operational Planning element applies to core programs.)

WIOA 20 CFR §678.800 requires that the state's network of One-Stop Career Centers be certified by the Local Boards. WIOA further mandates that the State Board, in consultation with chief elected officials and Local Boards must establish objective criteria and procedures that Local Boards must use when certifying career centers. These career center standards further and are consistent with the Governor's and State Board's guidelines, guidance, and vision. The criteria evaluate the one-stop career center delivery system for effectiveness in addressing business and job seeker needs in the Massachusetts business-driven workforce delivery system. The criteria also ensure compliance with WIOA Section 188 nondiscrimination provisions and the Americans with Disabilities Act.

To implement the One-Stop Certification process and policy under WIOA, the Massachusetts State Board created the "Career Center Standards and Process Workgroup" (CCS&P). The CCS&P Workgroup comprised a statewide diverse group of workforce professionals, representatives of core and other partner programs, including Vocational Rehabilitation, representatives of targeted customer groups, and business representatives. The group rolled out Massachusetts' inaugural statewide career center

standards in the areas of cost effectiveness, integrated services, **accessibility**, effective leadership, performance, and responsiveness to the business-driven model. Accessibility standards include the examination of systems to ensure staff knowledge of and compliance with Section 188 of WIOA.

The standards are a core driver of continuous service quality improvement. Through the One-Stop Career Center standards development process, career center responsive service delivery structure was determined to be a critical element in career center operation. This includes assessing the career center location for accessibility to the communities it serves, whether hours of operation are responsive to all partners', possessing adaptive technology, and ADA-compliance.

The MassHire Workforce Board Certification standards include the examination of board systems to conduct comprehensive annual reviews for programmatic and physical accessibility, including level of engagement of the disability community in conducting these reviews. Standards for certification will also require MassHire Workforce Boards to demonstrate how MassHire Career Centers are incorporating a universal design approach as the basis of standards for accessibility, ensuring a comprehensive process that focuses on both programmatic and physical access to meet the needs of a full array of customers. Please refer to Attachment B to see Universal Design Principles.

In accordance with policy 100 DCS 08.109: Accessibility within the Massachusetts Workforce System WIOA Section 188, local areas follow their policy to address compliance with and implementation of WIOA Section 188 physical and programmatic requirements. As stated above, the certification process for MassHire Career Centers and the state guidelines for local WIOA plan submissions both address matters pertaining to physical and programmatic accessibility. The MDCS Field Management and Oversight unit conducts on-site monitoring at all 29 MassHire locations, using the One-Stop Career Center Quality Assurance Standards. Further, the Massachusetts Department of Capital Asset Management (DCAM) conducts an accessibility review for any new leases or lease renewal activities based on ADA guidelines. Policy dictates that if any deficiencies are identified that One-Stops are informed in writing of the findings and given a deadline for when corrections need to be completed.

MDCS has made a commitment to work with the MassHire Workforce Boards and Career Centers to continue to improve the accessibility of programs and services to individuals with disabilities. Accessibility is part of MassHire Career Center quality assurance and has been incorporated as a basic tenet in MassHire staff training. The high percentage of individuals identified as having a disability utilizing the career center system is indicative of the full accessibility of the MassHire system.

The MassHire department of career services adheres to section 188 of WIOA, and *Executive Order 592: Advancing Workforce Diversity, Inclusion, Equal Opportunity, Non-Discrimination, and Affirmative Action*, and the final rule released for implementation of

the nondiscrimination and equal opportunity provisions of WIOA. All career centers, statewide, have incorporated practices to effectively serve persons with disabilities through required assistive technology and equipment at each center. Accessibility to serve job seekers with a disability is reviewed annually. Standard adaptive equipment for MassHire Career Centers include: zoomtext, jaws, scanner for jaws/zoomtext, dragon naturally speaking, hands-free, voice-activated software, braille labeler, assistive listening devices, text TTY line, height-adjustable tables, and trackball mouse, and other assistive technology.

Additionally, the Massachusetts Commission for the Blind and the Massachusetts Rehabilitation Commission regional office staff agree to assist career center staff with instruction on the use of assistive technologies for persons with disabilities. **Addressing the Accessibility of the One-Stop Delivery System for Individuals with Limited English Proficiency.**

Describe how the One-Stop delivery system (including One-Stop Career Center operators and the One-Stop delivery system partners) will ensure that each One-Stop Career Center is able to meet the needs of Limited English Proficient individuals, such as through established procedures, staff training, resources, and other materials.

It is the Executive Office of Labor and Workforce Development (EOLWD) policy to provide universal access to programs and services to persons who are limited in English proficiency.

MassHire Career Centers are required to develop standard operating procedures that include a *Language Access Plan (LAP)*. The local *LAP* follows the Commonwealth's guidelines, policies, procedures, and protocols as established in the *EOLWD's Language Access Plan*, which represents the Secretariat's administrative blueprint to provide meaningful and universal access to EOLWD agencies' programs, services, and activities for Limited English Proficiency (LEP) individuals.

Please refer to the Multilingual Services Resources webpage on MassWorkforce System website mass.gov/service-details/multilingual-language-guidelines for assistance to provide access to language services to LEP individuals.

Also, refer to *Mass Workforce Issuance 100 MDCS 08.101: Language Services Guidelines to Assist Limited English Proficiency and Deaf or Hard-of-Hearing Customers* – policy link found here: mass.gov/doc/08-101-2-language-services-guidelines-to-assist-limited-english-proficiency-customers/ for more specific language guidelines - Office of Multilingual Services:

The Office of Multilingual Services provides ongoing support, guidance, and expertise on Language Access issues (i.e., quality control and consultation on translation, interpretation, and cultural awareness) to the Workforce and Innovation Opportunity Act (WIOA) partner's agencies, which are co-located at MassHire Career Centers. The Multilingual Unit Staff possesses a vast array of international and multicultural

knowledge, including collective fluency in 12 languages, resulting in excellent communication with the LEP community. The Office acts as the central internal language facilitation unit for all EOLWD departments and its Partners.

The Multilingual Unit currently operates a 12-language toll-free telephone line, which LEP claimants (who speak one of the 12 statutory languages) can call should they have any issues or concerns.

Interpreter Services: In addition, the Career Center Staff have access to a professional over-the-phone language services (vendor providing over 170 languages) to provide language services to customers needing interpreter services.

Training: On a regular basis language access training is provided to MassHire Career Centers staff having contact with the public, so such staff are trained to work effectively with LEP customers and telephonic interpreters.

Internal Volunteer Bilingual Staff: The Office of Multilingual Services maintains an Internal Volunteer Bilingual staff list made up of Career Center staff who have the linguistic capability to assist customers across the Commonwealth.

Communications: Statewide communications are disseminated in 12 different languages to customers based on language preference as established during the enrollment process. Standard Publications are translated and posted on the EOLWD website: mass.gov/orgs/office-of-multilingual-services “Your right to an Interpreter” poster is displayed at all MassHire reception areas announcing the availability of free language assistance services.

Language Flashcards: “*I Speak*” language flashcards are available at the front desk area of each career center for a customer to point to language of choice if they are not able to speak English, which will trigger the language assistance plan.

Websites: The Office of Multilingual maintains several language access sites:

1. Multilingual webpage at mass.gov/orgs/office-of-multilingual-services
2. MassWorkforce System resources at mass.gov/service-details/multilingual-services-staff-resources
3. Multilingual Intranet: <http://intranet/CO/SitePages/Home.aspx>

IV. COORDINATION WITH *COMBINED STATE PLAN* PROGRAMS

IV. COORDINATION WITH *COMBINED STATE PLAN* PROGRAMS. Describe the methods used for joint planning and coordination among the core programs, and with the required One-Stop partner programs and other programs and activities included in the *Unified* or *Combined State Plan*.

Membership on the State Workforce Advisory Committee has been updated to reflect updates to partner’s organizational structure (e.g., MassAbility has replaced the MRC).

State Partner Advisory Committee

The State Partner Advisory Committee (SPAC) serves as the statewide coordinating committee for oversight of implementation of WIOA policies and principles across WIOA core programs. The purpose of the SPAC is to coordinate policy and program development, recognize emerging promising practices that can be scaled, and support local area implementation of WIOA through technical assistance.

The SPAC memberships includes:

- State Board/MassHire State Workforce Board (MSWB)
- Executive Office of Labor and Workforce Development (EOLWD)
- State Administration for USDOL Programs — Titles I and III, TRADE, DOL Vet etc./MassHire Department of Career Services (MDCS)
- Unemployment Insurance/Department of Unemployment Assistance (DUA)
- Executive Office of Education (EOE)
- Adult Education (ABE)/Adult and Community Learning Services (ACLS)
- Title II Apprenticeship/Division of Apprentice Standards
- Senior Community Service Employment (SCSEP)/Executive Office of Elder Affairs, and Operation A.B.L.E. and Senior Service America
- Vocational Rehabilitation/Massachusetts Rehabilitation Commission (MRC) and Massachusetts Commission for the Blind (MCB)/Executive Office of Health and Human Services (EOHHS)
- Low-Income/Temporary Aid for Needy Families, Supplemental Nutrition Assistance Program/Department of Transitional Assistance (DTA)/Executive Office of Health and Human Services (EOHHS)
- YouthBuild
- Job Corps
- Local MassHire Workforce Boards and MassHire Career Centers/Massachusetts Workforce Association
- Sector Projects, Research, Evaluations/Commonwealth Corporation
- Higher Education/Department of Higher Education (DHE)
- Veterans/Executive Office of Veterans Services (EOVS)

Meeting monthly or bi-monthly, the State Partner Advisory Committee coordinates across MassHire partner programs and other programs to hold regular regional and statewide convenings for all required and non-required partners at the state and local levels to receive information and guidance on implementing the *WIOA State Plan*, as well as engage in peer-to-peer sharing of promising practices emerging from locally driven partnerships.

The SPAC develops and issues [Joint Partner Policies](https://mass.gov/info-details/massworkforce-joint-partner-policy) mass.gov/info-details/massworkforce-joint-partner-policy and [Joint Partner Information](https://mass.gov/info-details/massworkforce-joint-partner-information) mass.gov/info-details/massworkforce-joint-partner-information across the broader workforce system network to inform all partners of key policy or programmatic changes in the workforce system. Examples of key Joint Partner Policies include policies on the *local Memorandum of Understanding (local MOU)*, WIOA State Partner Infrastructure contributions, and WIOA Shared Partner Contributions.

Massachusetts *Combined State Plan* Public Comment Process

To further solidify WIOA implementation and coordination among the WIOA partners, the *State Plan* Advisory Committee held a collective public comment process on the *Massachusetts Combined State Plan* from January 29 through February 12, 2024. The partners include the Executive Office Labor and Workforce Development, MassHire Department of Career Services, Department of Unemployment Assistance, Adult and Community Learning Services (Adult Education), Massachusetts Rehabilitation Commission, Massachusetts Commission for the Blind, Department of Transitional Assistance, and the Executive Office of Elder Affairs (SCSEP). The *draft State plan* is posted on the *Massachusetts' WIOA State Plan* website found here: [Massachusetts Workforce Planning](https://mass.gov/massachusetts-wioa-state-plan-and-workforce-area-plans), mass.gov/massachusetts-wioa-state-plan-and-workforce-area-plans where interested parties can submit commentary and feedback on the *draft State Plan*. The SPAC held a series of public forums on the *draft State Plan* on (January 31, 2024, and February 6, 2024. These public forums featured a joint plenary session where all partners presented on the key highlights of the *draft State Plan*, followed by breakout sessions led by each of the plan partners to provide attendees an opportunity to pose questions and provide feedback on the *draft State Plan* directly to agency staff. Comments on the *draft State Plan*, and the notes from the public sessions will be posted on the *State Plan* website.

V. COMMON ASSURANCES

Figure 58: Common Assurances

Massachusetts' state plan continues to include required assurances.

The State Plan must include assurances that:	
	mass.gov/service-details/massworkforce-wioa-policy-issuances-by-category
1.	The State has established a policy identifying circumstances that may present a conflict of interest for a State Board or local board member, or the entity or class of officials that the member represents, and procedures to resolve such conflicts;

	All Commonwealth employees are subject to the <i>Massachusetts Conflict of Interest Law</i>, G.L.c. 268A, § 6A, and appointed members of the State and Local Workforce Development Boards are “special state employees” within the meaning of that statute and, therefore, are subject to its provisions. The State Ethics Reform Law, G.L.c. 268A, § 28, imposes education and biennial online training requirements on public employees, including individuals appointed to Local Workforce Development Boards. All Commonwealth employees and local Board Members are provided with a Summary of the Conflict-of-Interest Law prepared by the State Ethics Commission and must take an online training every two years. See: Complete conflict of interest law education requirements mass.gov/complete-conflict-of-interest-law-education-requirements Conflict of interest code of Conduct mass.gov/doc/dcs-policy-03-107-conflict-of-interest-code-of-conduct/ During the MassHire Workforce Board certification process, local boards are required to provide assurance that they are adhering to the <i>Commonwealth’s Conflict of Interest Law</i>, including receiving <i>Conflict of Interest</i> training on a biennial basis. The Executive Office of Labor and Workforce Development and the Governor’s Office of Boards and Commissions ensures that state board members are properly apprised and trained of the <i>Commonwealth’s Conflict of Interest Laws</i> during the appointment and reappointment process, and on a biennial basis. MRC has conflict of interest policy for all employees as well as for consultants and SRC members.
2.	The State has established a policy to provide to the public (including individuals with disabilities) access to meetings of State Boards and local boards, and information regarding the activities of State Boards and local boards, such as data on board membership and minutes;
	The Commonwealth of Massachusetts is in compliance with <i>WIOA §101(g)</i> - the “<i>Sunshine Provision</i>”, and the <i>Massachusetts Open Meeting Law</i>, G.L.c. 30A, §§ 18-25, which impose certain obligations on Workforce Boards. Among these obligations are the legal requirements to conduct all business in an open and transparent manner. The purpose of the <i>Open Meeting Law</i> is to ensure transparency in the deliberations on which public policy is based. The Local Board must always assure compliance with the <i>Open Meeting Law</i> by, among other things, posting all meeting notices in a manner consistent with the law, by opening all meetings up to the public to attend, and by keeping accurate minutes of all meetings. The MassHire Workforce Board certification process requires that local workforce boards attest adherence to the <i>Commonwealth’s Open Meeting Law</i>. The Executive Office of Labor and Workforce Development, and relevant state agencies, ensure that the State Board maintains compliance with the <i>Commonwealth’s Open Meeting Law</i>.

3.	The lead State agencies with optimal policy-making authority and responsibility for the administration of core programs reviewed and commented on the appropriate operational planning elements of the <i>Unified or Combined State Plan</i> , and approved the elements as serving the needs of the populations served by such programs;
	The State Partner Advisory Committee, which comprises the lead State agencies, has been meeting twice monthly since May of 2023 with a specific focus on <i>Massachusetts' Combined State Plan</i> content. The <i>Massachusetts Statewide Memorandum of Understanding (state MOU)</i> requires that all signatories review, comment and approve the elements of the <i>Combined State Plan</i> as it pertains to the programmatic and fiscal operations supporting services to shared customers.
4.	(a) The State obtained input into the development of the <i>Unified or Combined State Plan</i> and provided an opportunity for comment on the plan by representatives of local boards and chief elected officials, businesses, labor organizations, institutions of higher education, the entities responsible for planning or administering the core programs, required One-Stop partners and the other <i>Combined Plan</i> programs (if included in the <i>State Plan</i>), other primary stakeholders, including other organizations that provide services to individuals with barriers to employment and the general public, and that the <i>Unified or Combined State Plan</i> is available and accessible to the general public; (b) The State provided an opportunity for review and comment on the plan by the State Board, including State agency official(s) for the Unemployment Insurance Agency if such official(s) is a member of the State Board;
	(a) The State Plan Advisory Committee (SPAC), comprising all required partners and additional partners has been meeting on a bi-weekly basis since May 2023 to address the strategic and operational opportunities generated by the new planning process and to create this <i>Combined State Plan</i>. The SPAC and its issue-specific sub-committees consisting of representation from local boards and chief elected officials, businesses, labor organizations, community colleges, core program partners, training vendors, and community-based organizations to ensure the perspective of the workforce systems' stakeholders are included in the development of the <i>Combined State Plan</i>. Please refer to the <i>Massachusetts Combined State Plan</i> Public Comment Process on page 175. The <i>draft State plan</i> is posted on the <i>Massachusetts' WIOA State Plan</i> website mass.gov/wioa-state-plan, where interested parties can submit commentary and feedback on the <i>draft State Plan</i>. (b) [Following Board approval prior to submission, add the assurance of the public process and vote by the state MassHire Board.]

5.	The State has established, in accordance with <i>WIOA section 116(i)</i> , fiscal control and fund accounting procedures that may be necessary to ensure the proper disbursement of, and accounting for, funds paid to the State through allotments made for the core programs to carry out workforce development activities;
	The state utilizes the Commonwealth's mandated MMARS (Massachusetts Management Accounting and Reporting System) System supported by agency accounting records and a structure which includes data warehouse systems and reports, annual audits, certification of local systems and intensive monitoring.
6.	The State has taken appropriate action to secure compliance with uniform administrative requirements in this Act, including that the State will annually monitor local areas to ensure compliance and otherwise take appropriate action to secure compliance with the uniform administrative requirements under WIOA section 184(a)(3);
	The Commonwealth's Field Management and Oversight unit conducts annual on-site fiscal and program monitoring, according to State Monitoring policies - mass.gov/service-details/massworkforce-wioa-field-management-oversight-policy-issuances , all Title I and Title III programs are monitored in each local area in accordance with the requirements established in the draft Regulations in NPRM §683.400 and 683.410 to ensure compliance with federal and state regulations and policies. Monitoring includes biannual systems certification and annual review of all local policies and standard operating procedures.
7.	The State has taken the appropriate action to be in compliance with WIOA section 188, Nondiscrimination as applicable; (See section III (b)(8))
	The Commonwealth of Massachusetts is in compliance with WIOA §188, M.G.L. 151B (Mass. non-discrimination statute), and Massachusetts Executive Order 526 (Massachusetts non-discrimination and equal opportunity Executive Order), 100 DCS 03.101 (MDCS complaint policy). MDCS regularly trains career center staff on working with non-discrimination and Limited English Proficiency (LEP) customers. Further, through the Workforce Board certification process and the Career Center annual planning, all local areas have attested to be in compliance with non-discriminatory practices, as required under the state and federal laws referenced above.
8.	The Federal funds received to carry out a core program will not be expended for any purpose other than for activities authorized with respect to such funds under that core program;
	The Commonwealth continues to utilize an aggressive system of monitoring grant reports, MOSES data and local grant activities together with mandated biennial certification of local systems to ensure that Federal funds are only utilized to support the grant activities reasonable, necessary, and appropriate to and authorized by each fund source.
9.	The State will pay an appropriate share (as defined by the State board) of the costs of carrying out section 116, from funds made available through each of the core programs;

	The State Board, as part of its ongoing workgroup to address WIOA implementation, created a sub-committee dedicated to establishing a new cost infrastructure standard which addresses mandated partner support for infrastructure costs including cost support for the Commonwealth's Performance Accountability system. Agreements to the shared infrastructure costs are included in the <i>Massachusetts State Agency WIOA Memorandum of Understanding (state MOU)</i> .
10.	The State has a One-Stop certification policy that ensures the physical and programmatic accessibility of all One-Stop Career Centers with the Americans with Disabilities Act of 1990 (ADA);
	The Commonwealth of Massachusetts imbedded adherence to the Americans with Disabilities Act of 1990 (ADA) to its One-Stop Certification policy to ensure comprehensive programmatic accessibility to all MassHire Career Centers. <i>Issuance: 100 DCS 17.103.2 Issued: 10/27/2020</i> <i>Career Center Certification for MassHire Workforce Boards</i> mass.gov/doc/dcs-policy-17-103-2-career-center-certification-for-masshire-workforce-boards/
11.	Service providers have a referral process in place for directing Veterans with Significant Barriers to Employment (SBE) to DVOP services, when appropriate;
	The Commonwealth of Massachusetts hereby assures that it will comply with Chapters 41 and 42 of 38 U.S.C. and provide proper oversight to ensure DVOP Specialists provide case management services for Veterans with significant barriers to employment. State agency partners agreed to establish referral processes for Veterans, including those SBEs, in the <i>WIOA MOU</i> . MDCS ensures continuance of a plan that targets those Veterans with significant barriers to employment (SBE), as well as any populations targeted by the Assistant Secretary DOL/VET. MDCS will monitor and provide proper oversight to ensure proper case management services are provided for Veterans with an SBE.
12.	Priority of service for Veterans and eligible spouses is provided in accordance with 38 USC 4215 in all workforce preparation, development or delivery of programs or services funded directly, in whole or in part, by the Department of Labor.
	The Commonwealth of Massachusetts hereby assures that priority of service for Veterans and eligible spouses is provided in accordance with 38 USC 4215 in all workforce preparation, development or delivery of programs or services funded directly, in whole or in part, by the Department of Labor. mass.gov/service-details/massworkforce-wioa-veterans-policy-issuances

VI. PROGRAM-SPECIFIC REQUIREMENTS FOR CORE PROGRAMS

The State must address all program-specific requirements in this section for the WIOA core programs regardless of whether the State submits either a *Unified* or *Combined State Plan*.

ADULT, DISLOCATED WORKER, YOUTH ACTIVITIES UNDER TITLE I-B

General Requirements:

Regions and Local MassHire Workforce Development Areas

Identify the regions and the local workforce development areas designated in the State.

Massachusetts WIOA MassHire Local Workforce Areas

Berkshire	Greater New Bedford
Boston	Hampden County
Bristol	Merrimack Valley
Brockton	Metro North
Cape Cod and Islands	Metro South/West
Central Massachusetts	North Central
Franklin Hampshire	North Shore
Greater Lowell	South Shore

Process for designating local areas

Describe the process used for designating local areas, including procedures for determining whether the local area met the criteria for “performed successfully” and “sustained fiscal integrity” in accordance with 106(b)(2) and (3) of WIOA. Describe the process used for identifying regions and planning regions under section 106(a) of WIOA. This must include a description of how the State consulted with the local boards and chief elected officials in identifying the regions.

Process and Identification of Local Areas

On May 20, 2015, the Department of Career Services issued Initial Designation of Local Workforce Development Areas, providing local chief elected officials the opportunity to request designation of the current workforce investment area as a workforce development area under WIOA. **All the sixteen local workforce areas designated under WIA requested and were granted designation under WIOA.**

Massachusetts, through its Massachusetts One-Stop Employment System (MOSES) database maintains quarterly reports for each local area that determine local programmatic performance against federal performance goals. Each of the sixteen workforce areas in Massachusetts demonstrated successful performance. Staff of the MassHire Department of Career Services (MDCS) determines the sustenance of fiscal integrity based on reviews of quarterly fiscal reports. Additionally, staff of the MDCS Field Management and Oversight unit conducts annual local reviews for each of the sixteen local workforce areas, including an analysis of fiscal and programmatic performance.

Process for the Determination of Planning Regions

Pursuant to WIOA Section 106(a), the Executive Office of Labor and Workforce Development (EOLWD) on behalf of the Governor presented draft proposed regions to the Workforce Skills Cabinet (i.e., Secretary of Labor and Workforce Development; Secretary of Economic Development; and Secretary of Education) as part of the Governor’s regional planning process. These proposed regions were submitted to local Chief Elected Officials, Local Workforce Boards, and the State Workforce Board for consultation ([Proposed Regional Designations under WIOA](#))

mass.gov/doc/proposed-regional-planning-requirements. EOLWD and the State Board reviewed comments on the proposed planning regional designations and finalized the regional designations in accordance with the above-cited issuance.

Massachusetts WIOA Planning Regions

The seven regions identified below have been designated as the Massachusetts WIOA Planning Regions:

1. **Berkshire Region:** Comprises the Berkshire Workforce Development Area
2. **Pioneer Valley Region:** Comprises the Franklin/Hampshire and Hampden Workforce Development Areas
3. **Central Massachusetts Region:** Comprises the North Central and Central Massachusetts Workforce Development Areas
4. **North Shore Region:** Comprises the Greater Lowell, Merrimack Valley, and North Shore Workforce Development Areas
5. **Greater Boston Region:** Comprises the Boston, Metro North, and Metro South/West Workforce Development Areas
6. **South Shore Region:** Comprises the South Shore, Brockton, Bristol, and Greater New Bedford Workforce Development Areas
7. **Cape Cod and Islands Region:** Comprises the Cape Cod, Martha's Vineyard, and Nantucket Workforce Development Area

Appeals process – local area designations

Provide the appeals process referred to in section 106(b)(5) of WIOA relating to designation of local areas.

MDCS Policy 100.DCS 03.101.2, Unified Workforce Development System Complaint and Appeals Process, posted on May 29, 2018, delineates the process to appeal the Governor's decision rejecting a request for designation as a workforce development area.

More information can be found here: [State Appeal of Local Area Designation mass.gov/files/documents/2018/05/29/03-101-2H.pdf](https://mass.gov/files/documents/2018/05/29/03-101-2H.pdf)

EOLWD/MDCS continue to review local fiscal and programmatic performance on an annual basis. Consistent with §679.250, local area fiscal and programmatic performance relative to designation is reviewed before Massachusetts' state plan is submitted to ensure compliance and to evaluate whether the areas continue to meet the requirements for subsequent designation. Massachusetts' local areas continue to meet the requirements for designation as workforce development areas. Massachusetts continues to review and improve its policies consistent with USDOL guidance. Pertinent workforce issuances can be found here: mass.gov/doc/initial-designation-of-local-

[workforce-development-areas, MDCS Policy 100.DCS 03.101.5, Unified Workforce Development System Complaint and Appeals Process – Revised, posted on 10/1/2025.](#)

Appeals process – infrastructure funding

Provide the appeals process referred to in section 121(h)(2)(E) of WIOA relating to determinations for infrastructure funding.

MDCS Policy 100.DCS 03.101.2, Unified Workforce Development System Complaint and Appeals Process, posted on May 29, 2018, delineates the process to appeal infrastructure funding. More information can be found here: [State Appeal related to Infrastructure Funding mass.gov/files/documents/2018/05/29/03-101-2H.pdf](https://www.mass.gov/files/documents/2018/05/29/03-101-2H.pdf)

From the *WIOA MOU policy*: A MassHire Career Center/Partner may appeal its portion of funds required for Career Center infrastructure costs after determination by the Governor under the State infrastructure funding on the basis that the State Board/Governor’s determination is inconsistent with proportionate share requirement in 20 CFR 678.735(a), the cost contribution limitation in 20 CFR 678.735(b), or cost contribution caps in 20 CFR 678.735.

The appeal must be made in writing to the MassHire State Workforce Board within ten (10) business days of the Governor’s determination. The appeal will be heard at the next MassHire State Workforce Board meeting, provided there are at least 14 days before the next meeting. If the Council’s regularly scheduled meeting is sooner than 30 days from the appeal submission, the Council chair will schedule an auxiliary meeting at least 30 days and no less than 30 days from the appeal submission. The MCC/partner program entity shall have the opportunity to submit written and verbal information to the Workforce Development Council. The Council will issue a decision within 14 days of the Council appeal hearing. Its decision will be final. Each partner may only appeal once per program year.

The request for appeal and/or formal appeal hearing must be sent to:

Executive Director, MassHire State Workforce Board
Executive Office of Labor and Workforce Development
100 Cambridge Street, 5th 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 the 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 curae) 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. 20 CFR 683.630(b)(3).

Statewide Activities

Provide State policies or guidance for the statewide workforce development system and for use of State funds for workforce investment activities.

The Commonwealth utilizes its authority to set-aside 15% of its Title I Adult, Dislocated Worker, and Youth allotments as Governor's Discretionary funding to accomplish all the required statewide employment and training activities under WIOA including: Program Administration and Oversight, Evaluation, Monitoring, Technical Assistance, establishing and disseminating information on best practices, eligible training providers, and performance.

The Commonwealth has utilized these funds to: develop sector partnership initiatives in Health care, Manufacturing and STEM; and develop statewide initiatives to target specific customer populations, including, but not limited to homeless individuals, individuals with disabilities, long-term unemployed, out-of-school youth and other individuals facing significant barriers to employment, as well as for the effort to rebrand the Commonwealth's workforce system (primarily workforce development boards and One-Stop Career Centers).

The Commonwealth will continue to utilize Governor's Discretionary funding to design and develop programs and initiatives that support implementation of the goals outlined in the *WIOA Combined State Plan*.

State use of Governor's Rapid Response set aside funding

Describe how the State intends to use Governor's set aside funding. Describe how the State will utilize Rapid Response funds to respond to layoffs and plant closings and coordinate services to quickly aid companies and their affected workers. States also should describe any layoff aversion strategies they have implemented to address at risk companies and workers.

Massachusetts utilizes the Governor's set aside funding to support statewide employment and training activities. Set aside funding provides support for program administration and oversight, evaluation, monitoring, technical assistance, establishing

and disseminating information on best practices, eligible training provider, performance evaluation, and developing initiatives in high-growth industries, and evaluating related outcomes. Massachusetts will continue efforts toward implementation of the WIOA Evaluation Agenda developed in collaboration with WIOA partner agencies.

If available, RRSA funds are specifically held aside for layoff or plant closing events:

- Of insufficient size to meet application requirements for a National Dislocated Worker Grant (NDWG); or
- For which a high number of Trade Adjustment Assistance (TAA)-related layoffs require additional funds to support staffing needs; or
- For which RRSA funds are needed as a “bridge” while awaiting the award of a requested NDWG, whether the NDWG is a new application or a modification request for additional funds.

Please refer to the [Rapid Response Set-Aside Funding mass.gov/doc/rapid-response-set-aside-funding](https://mass.gov/doc/rapid-response-set-aside-funding) policy for more detail.

Describe how the State provides early intervention (e.g., Rapid Response) to worker groups on whose behalf a *Trade Adjustment Assistance (TAA) petition* has been filed. (*Section 134(a)(2)(A).*) This description must include how the State disseminates benefit information to provide trade-affected workers in the groups identified in the TAA petitions with an accurate understanding of the provision of TAA benefits and services in such a way that they are transparent to the trade-affected dislocated worker applying for them (Trade Act Sec. 221(a)(2)(A) and Sec. 225; Governor-Secretary Agreement). Describe how the State will use funds that have been reserved for Rapid Response to provide services for every worker group that files a TAA petition.

The MassHire Rapid Response team is the gateway and often the first introduction for businesses and dislocated workers to the workforce system. Rapid Response investigates and initiates contact with companies for closings, layoffs, emergencies and natural disasters in accordance with [MassHire Workforce Issuance 100 DCS 11.101.3 mass.gov/doc/dcs-policy-11-101-3-masshire-rapid-response-process-under-wioa-updated/](https://mass.gov/doc/dcs-policy-11-101-3-masshire-rapid-response-process-under-wioa-updated/)

The Commonwealth’s Rapid Response, Trade Adjustment Assistance (TAA), Trade Readjustment Assistance (TRA) and National Dislocated Worker Grants (NDWG) programs are fully integrated and the TAA/TRA program is fully automated.

Upon determination that the employees of a company are impacted due to competition from a foreign country, the Rapid Response (RR) team initiates a petition through the MDCS Trade Unit and may open discussion of a National Dislocated Worker Grant (NDWG) application based on the demographics of the affected employees. Rapid Response information is available to all parties including the Career Centers and the DUA TRA Unit. In cases where Rapid Response is not already working with the employer

upon notification that a petition has been filed, the Trade Unit notifies Rapid Response to commence outreach efforts to that employer. The state also compiles a list of those workers who have filed UI claims against the company from the impact date to present through interfaces with the Massachusetts UI Online system and receives updates to those lists to provide notice to individual workers regarding the TAA Program. When available, the Trade Unit also uses a list from employers to provide these notices. TAA sent the notification letters to readability experts for review to ensure the notices were understandable and comprehensible to workers receiving the notice. Additionally, MDCS staff participated in a Behavioral study with Mathematica to examine the response rate of jobseekers when presented with different versions of a TAA notification letter. As a result of these activities, improvements have been made to the notifications letters. The notices reference the state's website and DOL's website for more detailed information regarding benefits and directions to contact their local MassHire Career Center immediately. Notices are sent with babel notices for those who speak English as a second language. In early 2023, the MDCS TAA Unit, hired a TAA Outreach Worker to work both independently and in collaboration with Rapid Response. The overarching goal of the outreach worker is to ensure that all potentially TAA eligible employers/workers in the Commonwealth are identified and informed of TAA services and benefits. The outreach worker focuses on conducting TAA informational sessions on site or virtually in collaboration with Rapid Response, streamlining unit communications and interactions with Rapid Response and Career Center staff, and fortifying all on-going outreach to potentially TAA eligible employers/workers and data collection. The TAA outreach worker also researches employers in the Commonwealth and Trade trends, informing and initiating new potential Petition filings.

TAA has also been integrated in our RESEA activities. Career Counselors are required to ensure that if the jobseeker has been laid off from a TAA certified company that they are directed to completing a TAA Eligibility Application. Since the impacted worker has attended either a "Gateway Session" or a Career Center Seminar (CCS - Career Center Orientation) they have received information regarding the Trade program and its benefits. Upon certification of the TAA petition, the impacted workers are immediately notified of potential eligibility for trade reemployment services and benefits and instructed to visit a MassHire Career Center to begin the eligibility process. A notice of their potential TAA eligibility appears on their UI account home page as well as an ICON appears within the MDCS MOSES (job seeker database) to inform the career center of the customers' eligibility. This information is also available to the MDCS Central TAA Unit, as well as DUA TRA Unit. All the TAA and TRA eligibility is processed electronically.

The job seeker works with the career center case counselor to determine the appropriate career pathway, which in most cases leads to training. The job seeker receives case management throughout the TAA/TRA process, and all information is readily available to all parties. In keeping with transparency, all TAA policies are disseminated to career center staff and posted through workforce issuances for the public to research and obtain. Training is regularly conducted for field staff and state

policies are posted on the MDCS website for staff and customers to reference. A dedicated phone line is also available for customers to contact the TAA Unit with other specific questions or concerns.

MDCS has established a process that allows local workforce areas to seek grants to address lay-off aversion strategies, bridging the gap between receipt of NDWG and staffing grants if a significant lay-off or multiple lay-offs that occur in a local area or region.

In case of natural disaster

In addition, describe the State policies and procedures to provide Rapid Responses in cases of natural disasters including coordination with FEMA and other entities.

In cases of natural disaster or emergency, Rapid Response provides services to both the affected business as well as affected employees. When a natural disaster occurs, Rapid Response coordinates with FEMA, MEMA and the Department of Labor Natural Disaster Coordinator as well as the MassHire Workforce Boards and MassHire Career Centers.

Services for businesses include coordinating with the Small Business Association (SBA) as well as other Economic Development agencies that can assist in connecting the businesses with loan and grant programs. Rapid Response also assists affected employees by providing information about all career center services including unemployment assistance and disaster-related employment, if applicable.

Massachusetts Rapid Response responds to all emergencies and disasters that affect the operation of businesses that cause job loss to employees.

Adult and Dislocated Worker Program Requirements

Alternative Training Models

Work-Based Training Models. If the State is utilizing work-based training models (e.g., on-the-job training, incumbent worker training, transitional jobs, and customized training) as part of its training strategy and these strategies are not already discussed in other sections of the plan, describe the State's strategies for how these models ensure high quality training for both the participant and the employer.

On-the-Job Training (OJT)

On-the-Job Training (OJT) has been demonstrated to be one of the most effective methods for ensuring sustainable employment for many customers. Massachusetts' initial OJT NEG a (June 2010) gave impetus to the implementation of a statewide system for OJT in Massachusetts. Policy, standardized procedures, statewide training, and technical assistance were developed, including a website providing policy guidance,

training presentations, OJT forms, sample training plans, outreach materials and other resources intended to support local areas in OJT implementation.

OJT is utilized on a case-by-case basis by many of the MassHire Career Centers.

Other Work-Based Training Models

Several training providers in the Boston area possess experience and capacity to develop industry-specific contextualized training in advanced math and reading, as well as soft skills, career exploration and counseling support. Boston has also had success with integrated ESL/Skill Training models for the limited English population. The Merrimack Valley is also experienced in the development of additional career pathways which generally combine contextualized education and occupational skills training for individuals who may need language or educational remediation in combination with technical skill development to obtain employment, particularly in the health care or IT fields.

Registered Apprenticeship

Registered Apprenticeship. Describe how the State will incorporate Registered Apprenticeship into its strategy for service design and delivery (e.g., job center staff taking applications and conducting assessments).

Massachusetts' Division of Apprentice Standards (DAS) and MassHire Department of Career Services (MDCS), both under the auspices of the Massachusetts Executive Office of Labor and Workforce Development (EOLWD), collaborate to ensure information about the registered apprenticeship opportunity is widely disseminated to stakeholders in the broader workforce system, including Workforce Boards, Career Center staff, and WIOA partner staff, who in turn communicate with business and job-seeker customers.

EOLWD is the recipient of multiple Department of Labor apprenticeship grants, totaling more than \$8M. The overarching goals of these grants are to expand the registered apprenticeship model to non-traditional industries and diversify the apprentice pipeline.

The initiatives supported by the DOL-funded apprenticeship grants spearheaded and strengthened the working relationship between MDCS and DAS. Both agencies are committed to the growth of apprenticeship in traditional and non-traditional industries and occupations and support the "[Apprenticeship Expansion in Massachusetts: Strategic Plan](https://mass.gov/files/documents/2018/06/20/Apprenticeship%20Expansion%20Plan%202018%20Final.pdf)", mass.gov/files/documents/2018/06/20/Apprenticeship%20Expansion%20Plan%202018%20Final.pdf published in June 2018. Massachusetts is in the process of updating this plan and will coordinate efforts with the state workforce board, as recommended by DOL through the State Apprenticeship Expansion Formula (SAEF) grant. The 2018

regional planning process also resulted in identification of three priority industries across the Commonwealth: Health care, Technology, and Manufacturing. In support of apprenticeship expansion in these industries, Massachusetts implemented a tax credit. Employers are eligible for up to \$9,600 in tax credits for each qualified apprentice. In 2023, Governor Healey and the Massachusetts Legislature expanded tax credit eligibility beyond these industries to others determined to be critical to the state's varying industries and regions.

DAS frequently informs MDCS of apprentice recruitment opportunities and offers weekly trainings on "*Registered Apprenticeship 101*" to interested staff along with prospective employers. MDCS shares the information with Career Center Directors, Workforce Boards and WIOA Partners via *MassHire Workforce Information Issuances* to reach the largest possible pool of jobseekers and employers. In 2023, DAS and MDCS further collaborated to launch the MassHire Apprenticeship Subject Matter Expert initiative. Created through the State Apprenticeship Expansion 2020 grant, MassHire staff are trained and funded to provide jobseekers and employers real-time information and access to Registered Apprenticeship opportunities.

DAS regularly offers competitive funding opportunities using federal grant and state funds to encourage more participation of MassHire workforce boards and career centers in the delivery of Registered Apprenticeship, including funding to implement Related Technical Instruction and Apprenticeship Intermediary Services. Multiple workforce boards in the state serve as formal intermediaries to offer apprenticeship program registration as well as jobseeker referral services to employers using Registered Apprenticeship as part of a more holistic and effective workforce development strategy.

As part of DAS' program approval process, all newly approved registered apprenticeship sponsors receive information about automatic eligibility for, and the benefits of inclusion on the *Massachusetts Eligible Training Provider List*. (See *ETPL* section below for additional details)

MDCS includes topics related to Registered Apprenticeship on the agenda at Workforce Partners Meetings, hosted by MDCS monthly. Attendees of these meetings include board and career center directors, as well as MassHire staff and practitioners from WIOA partner agencies. Topics have included the Registered Apprenticeship Tax Credit federal funding opportunities to expand Registered Apprenticeship, among others.

The Commonwealth participates in National Apprenticeship Week (NAW) annually by hosting, encouraging, and attending events that highlight the success of Massachusetts registered apprenticeship programs. Each year during NAW, the Governor issues a proclamation in support of apprenticeship expansion in the Commonwealth.

MassHire BizWorks

[MassHire BizWorks, mass.gov/bizworks](https://mass.gov/bizworks) a federal and state collaboration designed to enhance and align the services offered to Massachusetts businesses, publishes a Resource Guide for employers in the Commonwealth. The guide contains information related to registered apprenticeship and includes training with information specific to targeted groups of practitioners, Workforce Boards, Career Center Directors, Career Center Staff and business service staff. Topics include apprenticeship basics, employer engagement, apprentice support, data collection and data entry into Massachusetts One Stop Employment System (MOSES).

Massachusetts Community Colleges

The Massachusetts Community College system comprises 15 Community Colleges located within 50 miles of each other across the Commonwealth. Each college has a Business and Industry department that is in constant contact with employers and industry associations. Currently 6 of the 15 Community colleges are directly involved in the AAI and SAE grants. MassHire DCS communicates frequently with Massachusetts Association of Community Colleges (MACC) related to DOL funded apprenticeship grant announcements and possible areas of collaboration on apprenticeship projects and programs.

Training Provider Eligibility Procedure

Training Provider Eligibility Procedure. Provide the procedure for determining training provider initial and continued eligibility, including Registered Apprenticeship programs (WIOA Section 122). Describe how the State will implement and monitor the priority for public assistance recipients, other low-income individuals, or individuals who are basic skills deficient in accordance with the requirements of WIOA sec. 134(c)(3)(E), which applies to individualized career services and training services funded by the Adult Formula program. Describe the State's criteria regarding local area transfer of funds between the adult and dislocated worker programs.

The MassHire Department of Career Services and the Department of Unemployment Assistance jointly issue and update *policy 100.DCS 14-100.7 "Massachusetts Eligible Training Provider List (Massachusetts ETPL) Initial and Subsequent Eligibility Process* – Updated on September 26, 2022. mass.gov/service-details/massworkforce-wioa-training-policy-issuances.

Registered Apprenticeship (RA) sponsors and/or their vendors are included on the Massachusetts Eligible Training Providers list. The RA Sponsors must apply to the local workforce board to be placed on the list. Massachusetts DAS accepts a training provider that appears on the licensing board's website for licensed occupations. For unlicensed occupations Massachusetts Division of Apprentice Standards (DAS) accepts vendors

approved by the Massachusetts Department of Elementary and Secondary Education, in conjunction with Massachusetts Division of Occupational Licensure (DOL) Occupational Schools Division. Massachusetts DAS approves in-house related instructional programs in unlicensed occupations if: the instructor has six or more years in the occupation, attends adult learning seminars through Massachusetts DESE, and curriculum materials are industry approved. After the program receives RA approval from DAS, they can apply through the local board to be placed on the ETPL list.

MassHire Boards, MassHire Career Center Operators and other local providers of federally funded employment and training programs must review all policies and procedures to assure compliance with the POS requirements, including the assurance of POS requirements for Veterans at each point of entry for all applicable employment and training programs.

Massachusetts has developed training and will continue to revise and conduct training to staff of the Career Centers regarding POS related to federal employment and training programs.

Career Center Staff must assure that at the initial contact point (point of entry) at Veteran and/or covered persons are made aware of:

- their entitlement to priority of service;
- the full array of employment, training, and placement services; and
- any applicable eligibility requirements for those programs or services.

State and Local policies and procedures will ensure:

- monitoring and evaluation of priority of service will be incorporated within monitoring policies and procedures; and
- all reporting requirements will be met.

Describe how the State will implement and monitor the priority for public assistance recipients, other low-income individuals, or individuals who are basic skills deficient in accordance with the requirements of WIOA sec. 134(c)(3)(E), that requires American Job Center staff, when using WIOA Adult program funds to provide individualized career services and training services, to give priority of service to recipients of public assistance, low-income individuals, and individuals who are basic skills deficient (including English language learners).

Priority of Service Implementation and Monitoring

Please see the Massachusetts policy regarding priority of services: [WIOA Priority of Service for Jobseeker Customers mass.gov/doc/dcs-policy-08-116-priority-of-service-for-jobseeker-customers/](https://mass.gov/doc/dcs-policy-08-116-priority-of-service-for-jobseeker-customers/)

Priority of Service implementation is included as part of annual local monitoring of MassHire Career Center operators by the MassHire Workforce Boards. MDCS monitors the boards on an annual basis, ensuring sound monitoring procedures and practices.

Describe the State's criteria regarding local area transfer of funds between the adult and dislocated worker programs.

Local Funds Transfer: WIOA allows a local board to transfer, if such a transfer is approved by the Governor, "up to and including 100% of the funds allocated to the local area under paragraph (2)(A) or (3), and up to and including 100% of the funds allocated to the local area under paragraph (2)(B), for a fiscal year between (A) adult employment and training activities; and (B) dislocated worker employment and training activities."

Massachusetts requires that local Boards submit a formal request for such a transfer that includes the following information:

- Amount of funds being transferred
- Program from/to
- Assurance that the transfer of funds will not impact the level of services available to the population from which the funds are being moved
- Number of participants to be served by each program
- Number of participants receiving training services for each program

The Massachusetts WIOA Funds Transfer Authority Policy may be viewed, here:

[MassHire Workforce Issuance 01.108.1 WIOA Funds Transfer Authority mass.gov/doc/dcs-policy-01-108-wioa-funds-transfer-authority/](https://mass.gov/doc/dcs-policy-01-108-wioa-funds-transfer-authority/)

Describe the State's policy on WIOA and TAA co-enrollment and whether and how often this policy is disseminated to the local workforce development boards and required one-stop partners Trade Act Sec. 239(f), Sec. 235, 20 CFR 618.325, 20 CFR 618.824(a)(3)(i).

Pursuant to the *USDOL TEGL No. 4-20*, on January 4, 2021, *MDCS issued MassWorkforce Issuance 100 DCS 13.112 - TAA Co-Enrollment and Integrating Services with WIOA Title I Dislocated Worker Program policy* mass.gov/doc/dcs-policy-13-112-taa-co-enrollment-and-integrating-services-with-wioa-title-i-dislocated. On a monthly basis, MDCS TAA staff run specifically created management reports identifying customers that are enrolled in the TAA program but do not have a corresponding WIOA DW enrollment. Each area is sent the listing of customers that they need to follow-up with to either co-enroll or to elicit a reason for why the customer has refused co-enrollment. Co-enrollment is also reviewed and reinforced with MassHire Career Center staff during all TAA related trainings. TAA staff periodically review the State's database to again follow-up with MCCs when there is no justification documented for non-co-enrolled customers.

Describe the State’s formal strategy to ensure that WIOA and TAA co-enrolled participants receive necessary funded benefits and services. Trade Act Sec. 239(f), Sec. 235, 20 CFR 618.816(c)

The MDCS TAA Unit trains all local career center staff regularly to identify and co-enroll customers in any programs that they may benefit from. Additionally, during RESEA services, customers are checked for potential TAA eligibility and directed to a TAA Specialist if necessary.

Describe the State’s process for familiarizing one-stop staff with the TAA program. 20 CFR 618.804(j), 20 CFR 618.305

The MassHire TAA Program offers introductory and in-depth trainings an average of 2-3 times per program year for all MassHire staff. Training is broken up into modules in which each benefit under the TAA Program is reviewed in depth. In addition to the pre-programmed trainings throughout the year, the TAA Program has been known to schedule impromptu trainings for new employees, as changes/updates are disseminated by USDOL or as the need arises.

Youth Program Requirements

Youth Program Requirements. With respect to youth workforce investment activities authorized in section 129 of WIOA.

State-developed criteria

Identify the State-developed criteria to be used by local boards in awarding grants or contracts for youth workforce investment activities and describe how the local boards will take into consideration the ability of the providers to meet performance accountability measures based on primary indicators of performance for the youth program as described in section 116(b)(2)(A)(ii) of WIOA.[1]Further, include a description of how the State assists local areas in determining whether to contract for services or to provide some or all of the program elements directly.

The commonwealth encourages local boards to award contracts to youth service providers using a competitive procurement process when local areas have access to experienced and effective youth service providers. The local workforce board will work with the designated standing youth committee to consider the youth service strategy in the local area. The youth service strategy for each local area is based on demographics, barriers to the completion of secondary and post-secondary education, unique local conditions, and employer need.

Local boards will conduct an open and competitive bid process for the provision of WIOA youth services. Grants to successful bidders are encouraged to be awarded as single-year contracts with the option of renewal for additional years. During the open and competitive procurement process for WIOA youth activities, the criteria used by local boards to award grants will include selection of youth provider(s) that demonstrate the ability to provide the WIOA's Youth Program Elements to eligible in-school youth and out-of-school youth. These program elements provide youth with the education, skills, and training needed to progress on a career path toward meaningful employment. As part of the procurement process bidders will describe how they will meet primary indicators of performance in accordance with WIOA Section 116. Local boards will review youth performance of competitively procured youth service providers on an annual basis and take performance outcome information into consideration when refunding contracts.

As noted in 20 CFR §681.400, local boards may determine that the grant recipient or designated fiscal agent may, "provide directly some or all youth workforce investment activities."

Explain how the State assists local workforce boards in achieving equitable results for out-of-school and in-school youth. Describe promising practices or partnership models that local areas are implementing and the state's role in supporting and scaling those models within the state for both in-school and out-of-school youth.

Leveraging engagement with WIOA partner agencies to support youth with barriers to participation and successful completion of programming is key to ensuring that local workforce boards are achieving equitable results for in-school youth and out-of-school youth.

The Commonwealth will continue to work with local workforce boards to enhance partnerships with WIOA partner agencies to support youth with limited English proficiency, different abilities, economic disadvantages, court involvement and other challenges to program participation. As such, local workforce boards are encouraged to engage with WIOA partner agencies to collaborate and align services to meet the needs of in-school and out-of-school youth. Examples of this engagement may include formal agreements, e.g., *Youth MOU* (supplement to the *WIOA local MOU* that outlines the roles partners have in providing services to youth), or local representation from WIOA partner agencies on youth committees.

The Commonwealth will work with local workforce boards to scale the use of virtual reality as a tool for career exploration and work readiness for in-school and out-of-school youth. Virtual reality platforms provide youth with opportunities to learn of a variety of career options through an immersive experience. In-school youth and out-of-

school youth can learn of different careers through hands-on activities and problem-solving tasks that allow them to participate in active learning. Virtual reality platforms also mitigate barriers to participation in in-person career exploration opportunities such as challenges with transportation and time constraints.

Describe how the State assists local workforce boards in implementing innovative models for delivering youth workforce investment activities, including effective ways local workforce boards can make available the 14 program elements described in WIOA section 129(c)(2); and explain how local areas can ensure work experience, including quality pre-apprenticeship and registered apprenticeship, is prioritized as a key element within a broader career pathways strategy.

[Policy 100 DCS 19.107: WIOA Youth Individual Service Strategy mass.gov/doc/dcs-policy-19-107-wioa-youth-individual-service-strategy/](https://mass.gov/doc/dcs-policy-19-107-wioa-youth-individual-service-strategy/) states program staff must inform youth of the 14 WIOA program elements. The policy further states that WIOA eligible youth must participate in at least one of the WIOA program elements as required for program participation. Program elements should be selected based on the youth's objective assessment and individual need.

Youth are required to have access to all program elements and may benefit from a mix of program elements and services. Youth are to be informed of all 14 program elements during intake and assessment. When a program element is not offered by a youth service provider and it is deemed that the eligible youth will benefit from this element, a referral must be made to an alternate provider so the youth will have access to this element. Local areas may have policies in place that require all youth to participate in a specific set of program elements.

Youth program staff must document in the youth Individual Service Strategy (ISS) the program element(s) in which the youth will participate. Staff must also document in the ISS when a youth is referred to an appropriate service provider for participation in a program service element.

Local areas will also consider whether the following program elements are appropriate during follow-up services provided to youth:

- Supportive services;
- Adult mentoring (Must be provide for at least 12 months);
- When adult mentoring is offered during follow-up, MassHire Boards may extend the required 12-month follow-up period to allow for the requirement to provide adult mentoring for 12 months.
- Financial literacy education;

- Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and
- Activities that help youth prepare for and transition to postsecondary education and training.

Local workforce boards will leverage state and local funded youth programming including Connecting Activities and YouthWorks to provide work experiences and college and career readiness for youth. The alignment of Connecting Activities and YouthWorks programming along with WIOA Youth program offerings are key to supporting career pathways for youth.

Career pathways strategies will be informed by local area *Regional Plan Blueprints* that outline the region's priority industries and occupations. Local workforce boards will consider best practices and program models that provide youth with work experiences including pre-apprenticeship and registered apprenticeship opportunities that provide youth with the skills and training needed to meet the business need for a skill labor force.

Requires Additional Assistance

Provide the language contained in the State policy for “requiring additional assistance to enter or complete an educational program, or to secure and hold employment” criterion for out of school youth specified in WIOA sections 129(a)(1)(B)(iii)(VIII) and for “requiring additional assistance to complete an education program, or to secure and hold employment” criterion for in-school youth specified in WIOA section 129(a)(1)(C)(iv)(VII).

The [State policy 100 DCS 19.104 Youth Requires Additional Assistance](https://www.mass.gov/doc/youth-requires-additional-assistance) [mass.gov/doc/youth-requires-additional-assistance](https://www.mass.gov/doc/youth-requires-additional-assistance) provides language for requiring additional assistance to enter or complete an educational program, or to secure and hold employment” criterion for out of school youth specified in WIOA sections 129(a)(1)(B)(iii)(VIII) and for “requiring additional assistance to complete an education program, or to secure and hold employment” criterion for in-school youth specified in WIOA section 129(a)(1)(C)(iv)(VII).

Local Workforce Boards may choose to establish locally approved additional barriers based on demographic and unique local area circumstances. Utilization of the Youth Requires Additional Assistance barrier for program eligibility determination must be supported by a locally approved policy. The local definition must be approved by the Local Board and included in the Local Plan. Implementation of the Youth Requires Additional Assistance barrier must include documentation that clearly demonstrates that the youth meet this definition.

Single-area State requirements

Single-area State requirements. In States where there is only one local workforce investment area, the governor serves as both the State and local chief elected official. In such cases, the

State must submit any information required in the local plan (WIOA section 106(d)(2)). States with a single workforce area must also include:

- (1) Any comments from the public comment period that represent disagreement with the Plan. (WIOA section 108(d)(3).)
- (2) The entity responsible for the disbursement of grant funds, as determined by the governor, if different from that for the State. (WIOA section 108(b)(15).)
- (b) The type and availability of WIOA title I Youth activities, including an identification of successful providers of such activities. (WIOA section 108(b)(9).)

Not applicable.

Waiver Requests

Waiver Requests (optional). States wanting to request waivers as part of their *Title I-B Operational Plan* must include a waiver plan that includes the following information for each waiver requested: Identifies the statutory or regulatory requirements for which a waiver is requested and the goals that the State or local area, as appropriate, intends to achieve as a result of the waiver and how those goals relate to the *Unified or Combined State Plan*;

- (1) Describes the actions that the State or local area, as appropriate, has undertaken to remove State or local statutory or regulatory barriers;
- (2) Describes the goals of the waiver and the expected programmatic outcomes if the request is granted;
- (3) Describes how the waiver will align with the Department's policy priorities, such as:
 - (A) supporting employer engagement;
 - (B) connecting education and training strategies;
 - (C) supporting work-based learning;
 - (D) improving job and career results, and
 - (E) other guidance issued by the Department.
- (4) Describes the individuals affected by the waiver, including how the waiver will impact services for disadvantaged populations or individuals with multiple barriers to employment; and
- (5) Describes the processes used to:
 - (A) Monitor the progress in implementing the waiver;
 - (B) Provide notice to any local board affected by the waiver;
 - (C) Provide any local board affected by the waiver an opportunity to comment on the request;
 - (D) Ensure meaningful public comment, including comment by business and organized labor, on the waiver.
 - (E) Collect and report information about waiver outcomes in the *State's WIOA Annual Report*.
- (6) The Secretary may require that States provide the most recent data available about the outcomes of the existing waiver in cases where the State seeks renewal of a previously approved waiver.

Massachusetts is not requesting the approval of any WIOA waivers at this time.

Figure 59: ***Title I-B Assurances***

Massachusetts' state plan continues to include required assurances.

TITLE I-B ASSURANCES

The <i>State Plan</i> must include assurances that:	
1.	The State has implemented a policy to ensure Adult program funds provide a priority in the delivery of training services and individualized career services to individuals who are low income, public assistance recipients, or basic skills deficient;
	The MassHire Department of Career Services has established a policy that requires that Adult program funds provide a priority in the delivery of career and training services to individuals who are low income, public assistance recipients or basic skills deficient. WIOA Priority of Service for Jobseeker Customers mass.gov/doc/dcs-policy-08-116-priority-of-service-for-jobseeker-customers/
2.	The State has implemented a policy to ensure local areas have a process in place for referring Veterans with significant barriers to employment to career services provided by the JVSG program's Disabled Veterans' Outreach Program (DVOP) specialist;
	When meeting with Veteran job seekers, career center staff refer SBE veterans to the DVOP specialist following SBE eligibility determination. MDCS runs SBE reports for DVOP staff identifying any SBE Veterans that receive a career center services.
3.	The State has established a written policy and procedure that set forth criteria to be used by chief elected officials for the appointment of local workforce investment board members;
	The MassHire Department of Career Services Local Workforce Board Certification policy sets forth criteria and process for chief elected officials to use when making appointments to the local MassHire Workforce Board.
4.	The State established written policy and procedures to ensure local workforce investment boards are certified by the governor every two years in accordance with WIOA section 107(c)(2);
	All sixteen MassHire Workforce Boards have been certified in accordance with WIOA requirements.
5.	Where an alternative entity takes the place of a State Board, the State has written policy and procedures to ensure the alternative entity meets the definition under WIOA section 101(e) and the legal requirements for membership;

	n/a
6.	The State established a written policy and procedure for how the individuals and entities represented on the State Workforce Development Board help to determine the methods and factors of distribution, and how the State consults with chief elected officials in local areas throughout the State in determining the distributions;
	The MassHire State Workforce Board created a Workforce Allocations Committee (formerly the Workforce Allocations Task Force) comprising members of the workforce system, including representatives of chief elected officials. This board sub-committee brings to the full state board recommendations on the factors of distribution for Title I within state Allocations; once adopted by the Board, these recommendations are submitted to the Governor for state adoption.
7.	The State will not use funds received under WIOA Title I to assist, promote, or deter union organizing in accordance with WIOA section 181(b)(7);
	The Commonwealth hereby assures that it will not use funds received under WIOA Title I to assist, promote, or deter union organizing in accordance with WIOA section 181(b)(7).
8.	The State distributes adult and youth funds received under WIOA equitably throughout the State, and no local area suffers significant shifts in funding from year-to-year during the period covered by this plan;
	Through the Workforce Allocations Committee (formerly the Workforce Allocation Task Force), the Commonwealth established a policy on the formula and methodology for distribution of Title I adult and youth funds, within WIOA guidelines. A hold-harmless provision ensures that each local area's percentage share of the State allotments designated for local WIOA Title 1 Youth and Adult program activities does not fall below 90% of the local area's average percentage share for the prior two fiscal years.
9.	If a State Workforce Development Board, department, or agency administers State laws for vocational rehabilitation of persons with disabilities, that board, department, or agency cooperates with the agency that administers Wagner-Peyser services, Adult and Dislocated Worker programs and Youth Programs under Title I;
	The Massachusetts Rehabilitation Commission (MRC) and the Massachusetts Commission for the Blind (MCB) are the two state agencies that administer state laws for vocational rehabilitation of persons with disabilities, and the MassHire Department of Career Services (MDCS) is the state agency that administers the Wagner-Peyser services, Adult and Dislocated Worker programs, and Youth Programs under Title I. All agencies are party to the WIOA MOU that establishes agreement to cooperate and coordinate across shared customers.

10.	The State agrees to report on the impact and outcomes of its approved waivers in its WIOA Annual Report.
	The State hereby agrees to report on the impact and outcomes of any approved waivers in its WIOA Annual Report. It should be noted that Massachusetts currently has no approved waivers.
11.	The State has taken appropriate action to secure compliance with the Uniform Guidance at 2 CFR 200 and 2 CFR 2900, including that the State will annually monitor local areas to ensure compliance and otherwise take appropriate action to secure compliance with the Uniform Guidance under section WIOA 184(a)(3);
	The State performs Annual on-site monitoring reviews of each local area to ensure compliance with 2 CFR part 200, as required by WIOA section 184(a)(3). During this on-site review, • The State ensures that established policies achieve the appropriate program quality and that outcomes meet the objectives and regulations of the Workforce Innovation Opportunity Act (WIOA). • The review enables the Governor/State to determine if sub-recipients and contractors are compliant with WIOA and Wagner-Peyser requirements. • The review enables the State to determine whether a local plan will be disapproved for failure to make acceptable progress in addressing deficiencies as required in WIOA section 108(e)(1); and • The review enables the state to ensure compliance with the non-discrimination, disability, and equal opportunity requirements of WIOA 188. • The State reports the review outcomes, provides technical assistance and follow-up, and initiates corrective action (if necessary). Local Boards, as part of the annual planning process assure to adhere to the financial recordkeeping, cost principles and cost allocation requirements in WIOA.

WAGNER-PEYSER ACT PROGRAM (Employment Services)

Employment Service Professional Staff

Provision of Labor Exchange Services

Describe how the state will staff the provision of labor exchange services under the Wagner-Peyser Act, such as through state employees, including but not limited to state merit staff employees, staff of a subrecipient, or some combination thereof. (Note-States not seeking to utilize the staffing flexibility in the final rule as part of their *2020 State Plan* submission can answer this question by entering that the state will utilize state merit staff employees.)

The Commonwealth will continue to employ its current staffing regarding provision of Wagner-Peyser services. In accordance with the recently released W-P Final Rule, Massachusetts will participate in an evaluation on staffing models and labor exchange

Professional Development

Describe how the State will utilize professional development activities for Employment Service staff to ensure staff is able to provide high-quality services to both jobseekers and employers.

The Commonwealth recognizes the importance of providing quality customer service to both our job seeker and employer customers. The Executive Office of Labor and Workforce Development/MassHire Department of Career Services (EOLWD/MDCS) continues the process of assessing the current skill-levels of career center staff and analyzing the knowledge, skills and abilities needed to perform each job in the career center. A curriculum including a series of training modules has been designed, developed, and continues to expand to deploy customized training to career center staff, including all partner staff to meet these training needs.

EOLWD/MDCS continues the work of MassHire BizWorks providing training on standard staff business service knowledge and competencies across multiple state agencies that are responsible for the provision of myriad programs and services to the Commonwealth's employers.

EOLWD/MDCS is invested in ensuring Career Center management and staff have the knowledge and understanding of the local, state, national and global economy as the Commonwealth implements a demand-driven system. EOLWD/MDCS has focused on additional specific areas of professional development as follows:

Platform Skills: MDCS has reviewed the levels and skills sets that are required to enhance/improve staff abilities to conduct one on one career counseling, workshops and public presentations and giving exceptional customer service to both job seekers and employers. These skills are critical to ensuring that the employer and jobseeker customers understand the

depth and breadth of the services available to them and to promote knowledge and utilization of the Massachusetts Workforce Development System.

Labor Market Information (LMI): It is essential to understand that LMI touches every aspect of the job search, as far as locating and understanding the skills required by in-demand jobs, and how to identify transferable skills, or the need to upgrade current skills to meet the needs of employers. It also assists staff and customers identify appropriate salary demands and many labor trends. Staff and customers will also understand the need for researching companies and building interview skills to prepare for the interview and negotiate salaries. EOLWD/MDCS has invested in tools to help in this effort.

Using Tools Effectively: Staff have and will continue to be provided with training on: Burning Glass/Labor Analytics, Mass Career Information Systems (Mass CIS 360), O*Net Online and TORQ. The training demonstrates how to assist job seekers to search for and access valuable labor market information on industry trends and career projections that will inform their choices in seeking employment and/or training. Breaking down job descriptions and resumes to identify and focus on the skills required for the job, utilizing software such as TORQ, moves Massachusetts significantly in a demand driven manner.

Business and Demand Driven Methodologies: By utilizing a variety of training and professional development resources including classroom training and online resources - such as workforcegps.org/ staff will stay current with the latest tools and techniques for enhancing employer engagement and connecting jobseekers with quality jobs.

Technology: EOLWD/MDCS consistently upgrades its IT resources, including hardware and software to ensure that staff is kept up to date with innovations in technology that assist them in providing high quality services to jobseekers and employers. Specific training is conducted on the statewide database, the Massachusetts One-Stop Employment System (MOSES), consistently as software and programming upgrades are made. Internal training sessions as well as online programs, webinars and video conferencing are used to keep staff, and subsequently customers, aware of advances in relevant technology resources and tools.

Social Media: Another important aspect of staff training and development continues to be to enhance their skills in the effective use of technology in the job search. Staff must be able to assist job seekers in utilizing technological tools such as using email, social media, and online job applications to communicate and to market their skills to employers. Understanding that many employers will review an applicant's Internet profile as a part of a background check is important. Mastering the use of electronic communication via email and other online applications (for example, LinkedIn) is essential to ensuring that staff can communicate with job seekers for the purposes of doing outreach for targeted recruitment and connecting those job seekers to appropriate employers.

The Commonwealth is committed to providing consistent and current professional development activities and training to all staff within the Massachusetts Workforce System

including the State Board, Local CEOs, Local Boards, Career Center Staff, including Core Partner staff and external Partners as well.

Training to identify Unemployment Insurance Eligibility Issues

Describe strategies developed to support training and awareness across core programs and the Unemployment Insurance program and the training provided for Employment Services and WIOA staff on identification of Unemployment Insurance (UI) eligibility issues and referral to UI staff for adjudication.

The Commonwealth of Massachusetts is a fully integrated and interconnected workforce development system. The Massachusetts Executive Office of Labor and Workforce Development's (EOLWD) Departments of Unemployment Assistance (DUA) and Career Services (MDCS) are responsible for the direct oversight of all the Massachusetts Workforce Development programs, including Unemployment Insurance (UI), Workforce Innovation and Opportunity Act (WIOA), and Wagner Peyser/Employment Services (ES) funded through the U.S. Department of Labor (USDOL). MDCS/DUA continuously works to improve communication and integration internally and externally through the Massachusetts Workforce System. Internally, MDCS and DUA continue to support in each agency an integration and coordination liaison that tackles several cross-agency issues and assists in the training and development of all career center and call center staff. MDCS/DUA will continue to provide training across the Commonwealth to MassHire career center staff, including partner staff, regarding the identification of potential UI eligibility issues. MassHire Career Center staff have been trained when conducting face to face interviews on how to utilize open ended questions regarding ongoing work search strategies which are utilized across all job seeker customers. DUA/MDCS have put protocols in place on how to report potential UI eligibility issues for adjudication. If career center staff become aware of a potential UI eligibility issue that are outside the Reemployment Service Reemployment Eligibility Assessment (RESEA) process (notification of potential UI eligibility issues on RESEA claimants is conducted through a database system interface) DUA is notified immediately.

Assisting individuals filing claims at OSCC

Explain how the State will provide information and meaningful assistance to individuals requesting assistance in filing a claim for unemployment compensation through One-Stop Career Centers, as required by WIOA as a career service.

The Commonwealth has ensured that there has been on-site assistance at MassHire Career Centers to assist individuals who are filing a UI claim since 2000 with the inception of Career Centers. Since the launch of UI Online in 2013, DUA/MDCS have collaborated to better streamline and improve on that service delivery within the career center system.

Career centers have a dedicated bank of computers and telephone lines available which are accessible to any career center customer that needs assistance filing a claim for unemployment compensation. Along with the telephone banks, DUA instituted a MDCS consultation line. This line is a direct connection from the career centers to DUA call center staff for additional assistance relating to all UI issues.

Specialized training continues to be conducted to ensure that staff can confidently assist individuals filing UI claims. Please see issuance for example:

[Unemployment Insurance \(UI\) Online Navigation Trainings mass.gov/doc/dcs-info-14-313-unemployment-insurance-ui-online-navigation-trainings/](https://mass.gov/doc/dcs-info-14-313-unemployment-insurance-ui-online-navigation-trainings/)

Strategy for providing reemployment assistance to UI claimants

Describe the State’s strategy for providing reemployment assistance to UI claimants and other unemployed individuals.

The Commonwealth revitalized its reemployment efforts to assist UI claimants and other unemployed individuals to ensure a “holistic” approach to reemployment services that included designing a solid program that would be viable across all funding sources; flexibility in the design and implementation to allow each career center the ability to customize the re-design to meet the needs of their local customer population; and on-going partner and customer feedback to continually improve programs and services offered to our customers.

The revitalization was focused in two areas: Re-designing our Career Center Seminar - Orientation (CCS); and a re-designed customer flow. This has assisted the Commonwealth in quickly adapting this approach to meeting the reemployment service needs to shared/common customers across all core partner programs, services and activities.

The premise is that the CCS is the main portal into the career center. This orientation provides customers with information on, and access to, the full array of services, programs, and activities available at or accessible from the career center. As part of the orientation the customer will complete a self-assessment of their work search strategies, complete a job profile, and with a career counselor review their approach to work search, their work search efforts, all their assessment results and establish the next appropriate step in their career plan. In short, the career center can assist all customers to prepare to find their next job; explore options to upgrade their skills; access specialized services including core partner services; and/or connect to other community resources. As stated above, it is essential to include flexibility within the design to allow for customization at the local level that would directly meet the needs of local job seekers and employers.

Attendance at a CCS is mandated, as well as participation in all these reemployment service activities for UI claimants who have been deemed permanently separated (not work attached and most likely to exhaust) however, it is not mandated for all career center customers. Although all customers may not attend this specifically designed CCS, it is the regular practice of the career center to schedule all customers for a similar orientation that leads to the rest of the services, activities and programs offered by the career centers.

W-P funds to support UI claimants

Describe how the State will use W-P funds to support UI claimants, and the communication between W-P and UI, as appropriate including the following:

Described below.

Labor exchange for UI claimants

Coordination of and provision of labor exchange services for UI claimants as required by the Wagner-Peyser Act:

Described below.

Registration of UI claimants

Registration of UI claimants with the State's employment service if required by State law;

Described below.

Administration of the work test

Administration of the work test for the State unemployment compensation system, including making eligibility assessments (for referral to UI adjudication, if needed), and providing job finding and placement services for UI claimants; and

Described below.

Referrals and applications for education and training

Provision of referrals to and application assistance for training and education programs and resources.

This section includes a response to items number 1, 2 and 3, above. MDCS/DUA have been joint managing a successful Reemployment Service and Eligibility Assessment (RESEA) Program since 2009. The Massachusetts model has always required all Permanently Separated (not work attached) UI Claimants to participate in upfront delivery of Reemployment Services (RES) which was followed by a reemployment eligibility assessment determination upon another visit to the career center.

The Commonwealth was well positioned with the inception of Reemployment Services Eligibility Assessment (RESEA) to expand and improve upon its model to provide an even more robust delivery of Reemployment Services for UI claimants.

UI claimants who are selected for this program must attend a CCS, receive defined reemployment services, and attend a follow up review. If they fail to do so, they will be indefinitely disqualified for UI benefits.

All permanently separated UI claimants (not work attached and most likely to exhaust) are enrolled in the RESEA program. The RESEA claimant is mandated to attend a CCS. As stated above, the CCS is the main point of entry into the career center where the claimant is introduced to the full array of services available to them through the Massachusetts workforce system. The goal is to immediately engage the job seeker and provide a "value added" experience for the UI customer. During the CCS, UI claimants complete a job search inventory, a skills assessment, and a *Career Action Plan (CAP)* with a job counselor.

A career center staff member then reviews work search activity, individually with the UI claimant. They discuss the number of jobs, types of jobs, industry of choice, labor market trends impacting the job market and the customer's methods of follow-up. Prior to leaving on this first visit, the RESEA customer is scheduled for additional career center services, as well as a follow-up RESEA review.

The follow-up RESEA is another work test point where again career center staff ensure that the customer is on the right track in their work search efforts. Throughout RESEA participation the counselor provides guidance, (i.e., if the claimant is only applying to one industry the counselor will work with the claimant and prepare a job profile through the TORQ program to demonstrate to the claimant how his/her skills may be more broadly applicable).

All career center customers, including UI claimants are introduced to the myriad of labor market, career awareness and assessment tools available to assist them in their work search efforts, including but not limited to TORQ, Mass CIS, and WorkKeys.

After reviewing the customers' assessment, the determination is made by the customer and counselor if the customer needs additional education and/or training to upgrade skills to meet the knowledge, skills, and abilities that are in demand to improve the prospect for employment, they will begin that process together.

As stated above, if at any time during a UI claimant's journey through the Massachusetts workforce system it becomes evident that the claimant has a potential UI eligibility issue, DUA is notified immediately. If a RESEA customer does not attend or fully participate in required services, the Career Center staff record the non-attainment within the Massachusetts One-Stop Employment System (MOSES) database and that the information is electronically transferred to UI Online database and triggers a disqualification for benefits until the customer fully participates.

UI Online and the MOSES database have several points of automated integration. As examples, information regarding profiled claimants and RESEA participants is seamlessly passed between the agencies. Upon successfully filing a claim, claimants receive a link to the Massachusetts job bank system known as MassHire JobQuest. This webpage also provides a number of resources, such as a listing of the career centers around Massachusetts and a link to start an assessment of their skills through TORQ. DUA and MDCS are committed to continuously improve on creating linkages both through technology and programming to connect the claimant to reemployment services.

Agricultural Outreach Plan (AOP)

Agricultural Outreach Plan (AOP). Each State agency must develop an AOP every four years as part of the *Unified or Combined State Plan* required under *sections 102 or 103* of WIOA. The AOP must include—

(1) Assessment of Need

Provide an assessment of the unique needs of farmworkers in the area based on past and projected agricultural and farmworker activity in the State. Such needs may include but are not limited to employment, training, and housing. The assessment of need must include: an assessment of the agriculture activity in the State: 1) identifying the top five labor-intensive crops, the months of heavy activity, and the geographic area of prime activity; 2) Summarize the agricultural employers' needs in the State (i.e. are they predominantly hiring local or foreign workers, are they expressing that there is a scarcity in the agricultural workforce); and 3) Identifying any economic, natural, or other factors that are affecting agriculture in the State or any projected factors that will affect agriculture in the State.

An assessment of the unique needs of farmworkers means summarizing MSFW characteristics (including if they are predominantly from certain counties, what language(s) they speak, the approximate number of MSFWs in the State during peak season and during low season, and whether they tend to be migrant, seasonal, or year-round farmworkers). This information must take into account data supplied by WIOA Section 167 National Farmworker Jobs Program (NFJP) grantees, other MSFW organizations, employer organizations, and State and/or Federal agency data sources such as the United States Department of Agriculture and the United States Department of Labor (US DOL) Employment and Training Administration.

For Assessment of Need - Please refer to the *Plan (Section 1)* below.

(1) Outreach Activities. The local offices outreach activities must be designed to meet the needs of the MSFWs in the State and to locate and contact MSFWs who are not being reached through, normal intake activities. Describe the State agency's proposed strategies for:

- (A) Contacting farmworkers who are not being reached by the normal intake activities conducted by the employment service offices.
- (B) Providing technical assistance to outreach workers. Technical assistance must include trainings, conferences, additional resources, and increased collaboration with other organizations on topics such as One-Stop Career Center services (i.e., availability of referrals to training, supportive services, and career services. as well as specific employment opportunities), the Employment Service and Employment-Related Law Complaint System ("Complaint System" described at 20 CFR 658 Subpart E), information on the other organizations serving MSFWs in the area, and a basic summary of farmworker rights, including their rights with respect to the terms and conditions of employment.
- (C) Increasing outreach worker training and awareness across core programs including the Unemployment Insurance (UI) program and the training on identification of UI eligibility issues.
- (D) Providing State merit staff outreach workers professional development activities to ensure they are able to provide high quality services to both job seekers and employers.

- (E) Coordinating outreach efforts with NFJP grantees as well as with public and private community service agencies and MSFW groups. If an NFJP grantee is the State Workforce Agency's (SWA) subrecipient conducting outreach, provide: (i) a description of that relationship; (ii) A description of any other MSFW service providers the NFJP is coordinating with; and (iii) the NFJP grantee's outreach plan to be included in the *State Plan*.

For Outreach Activities - Please see *Section 2* in Plan below.

The plan for the proposed outreach activities must include:

- The goals for the number of farmworkers who will be contacted each program year by W-P staff.
- The number of farmworkers who will be contacted each program year by other agencies under cooperative arrangements. These numerical goals must be based on the number of farmworkers estimated to be in the State in the coming year, taking into account the varying concentration of farmworkers during the seasons in each geographic area, the range of services needed in each area and the number of W-P and/or cooperating agency staff who will conduct outreach..⁵
- The State's plans to conduct outreach to as many farm workers as possible.
- The number of outreach workers dedicated to outreach to farmworkers by service areas.

⁵ The numerical goals that must be included in the agricultural outreach plan are in reference only to the proposed outreach activities and are not negotiated performance targets.

2024 Agricultural Outreach Plan

TWO YEAR UPDATE

Massachusetts agriculture has undergone notable shifts in its workforce distribution over the last 10+ years. Middlesex and Worcester Counties expanded significantly, rising to first and second place, while Plymouth, once the leader, declined to third. The Connecticut River Valley counties of Hampshire, Franklin, and Hampden experienced marked losses, with Hampden showing the steepest reduction. Counties situated closer to major population centers, such as Essex and Middlesex, benefited from stronger market access and posted gains in their agricultural labor force. Massachusetts reviews its Agricultural Outreach Plan to ensure such shifts are accounted for.

Worcester benefited from stronger market access and posted gains in their agricultural labor force. Smaller counties, including Barnstable, Norfolk, Dukes, and Suffolk, registered modest increases, whereas Berkshire and Nantucket saw slight declines.

Taken together, the data reveals a reshuffling of rankings and highlights regional disparities. Counties near urban hubs have managed to grow their agricultural workforce, while those more dependent on farmland and narrower markets face mounting pressure. This uneven pattern underscores the importance of workforce strategies that address both growth opportunities and vulnerabilities across Massachusetts agriculture. Further, there is limited data available on this population of workers.

County	Ag. Workers 2012	Ag. Workers 2017	Ag. Workers 2022	% Change 12 - 22	% Change 17 - 22	Labor Shortage
Middlesex	1940	1873	2409	24.2%	28.6%	Yes
Worcester	1825	2262	2226	22.0%	-1.6%	Yes
Plymouth	2311	1467	2008	-13.1%	36.9%	Yes
Franklin	1490	1457	1423	-4.5%	-2.3%	Yes
Hampshire	1554	1267	1249	-19.6%	-1.4%	Yes
Essex	978	1187	1139	16.5%	-4.0%	Yes
Hampden	1406	902	859	-38.9%	-4.8%	Yes
Bristol	659	928	725	10.0%	-21.9%	Yes
Barnstable	557	512	593	6.5%	15.8%	Yes
Berkshire	566	582	556	-1.8%	-4.5%	Yes
Norfolk	349	368	499	43.0%	35.6%	Yes
Dukes	157	263	221	40.8%	-16.0%	Yes
Nantucket	129	51	71	-45.0%	39.2%	No
Suffolk	9	23	54	500.0%	134.8%	No

Source: USDA, NASS 2017/2022 Census of Agriculture

The table above represents the best estimate MDCS can provide with the limited data available from sources such as 2017 and 2022 Census of Agriculture, Agricultural Review (USDA, NASS Publications), statistical data from the Massachusetts Department of Agricultural Resources and our historical data records. The determination regarding labor shortage is based on the best estimate of workers reported by employers and the total number of requests filed for H-2A workers during 2019.

The number of Migrant or Seasonal Farmworkers (MSFWs) in the state continues to be a moving target. There are no concrete numbers quantifying the number of workers engaged in agriculture other than the Census of Agriculture. Conducted every five years by the U.S. Department of Agriculture's National Agricultural Statistics Service (NASS), the Census collects data on every aspect of U.S. agriculture. The most recent data from the 2022 Census places the number of workers employed in crop activities at 14,032 which represents an increase of +6.77% from the 2017 survey. While the MDAR statistical data list between +/- 60,000 direct or indirect jobs created as a result of the agriculture activity in Massachusetts. According to the 2022 Census of Agriculture, Massachusetts reported 14,032 hired farm workers statewide. National farm labor research indicates that the majority of hired crop workers in the United States are settled workers rather than migrants, further limiting the ability to equate total hired labor with the MSFW population.

Due to the seasonal and mobile nature of this workforce, forecasting is inherently imprecise and influenced by factors such as crop demand, weather conditions, housing availability, wage levels, and regional labor market competition.

For the 2024–2028 plan period, MDCS anticipates that the MSFW population may remain generally consistent with recent historical levels, with modest fluctuations driven by agricultural production patterns and employer labor demand. Rather than relying on fixed numeric projections, MDCS will use real-time employer input, interagency data sharing, and seasonal labor demand indicators to scale outreach activities and ensure alignment with actual workforce needs while maintaining compliance with federal equity-of-service requirements.

Projected agricultural activity in Massachusetts indicates a heightened need for SWA intervention to ensure wage transparency and accurate job classification. The October 2025 Interim Final Rule (IFR) introduced a two-tiered wage system and the Adverse Compensation Adjustment (ACA) housing deduction, which is projected to reduce farm worker wages by 26-32% nationally.

Massachusetts agriculture is anchored by greenhouse and nursery products, cranberries, apples, vegetables, and poultry, with tobacco grown only in the western region. Crop performance varies by year: some growers report strong yields due to favorable weather and pollination, while others face losses from heat stress or extreme rainfall. Cranberry production dipped slightly, while apple production rose 9% statewide. Vegetable production remains stable and concentrated in Hampshire, Worcester, Middlesex, Hampden, Bristol, and Essex counties.

From 2012–2017, drought, rising costs, and land loss reduced farm numbers and acreage. More recently, repeated extreme rainfall—especially in the Connecticut River Valley—has caused flooding, soil erosion, and major crop damage. COVID 19 further disrupted markets, pushing farms toward direct-to-consumer sales. Between 2012 and 2022, greenhouse operations consolidated into fewer but larger and more productive farms, strengthening year-round production.

Pressures are most severe in Franklin, Hampshire, and Hampden counties, where farms rely heavily on limited farmland and have fewer market options. Farms closer to population centers (Middlesex, Worcester, Essex) benefit from more diverse markets and greater adaptability.

Regional crop patterns include:

- Greater Boston: Nursery, vegetables, apples, berries
- Southeast: Nursery, cranberries, vegetables, berries
- Northeast: Apples, nursery, vegetables, small fruits
- Central: Apples, nursery, vegetables
- Western: Apples, nursery, berries, vegetables, and the state's only tobacco production

Labor shortages remain a persistent challenge. The aging workforce (average producer age nearly 59) and reduced availability of local seasonal labor have increased reliance on H 2A workers. During the pandemic, Massachusetts lost 40% of its H 2A workforce, though numbers have since stabilized at about 607 workers annually. More H 2A workers are now entering the state.

According to the 2022 USDA Census, Massachusetts has 7,083 farms on 464,451 acres, generating \$607 million in annual sales and employing 25,920 people. Small farms dominate: 94% earn under \$250,000 annually, and nearly 80% are family owned. The state ranks among the top in the nation for direct-to-consumer sales, reflecting a strong local food economy.

The MSFW program continues to engage in robust outreach and compliance efforts on this program, in line with USDOL requirements. Before the New England Farm Workers' Council (NEFWC) ceased operations in September 2024, MDCS and the State Monitor Advocate (SMA) maintained an MOU with the organization to coordinate MSFW services, reduce duplication, and support shared referrals, data exchange, and joint training activities. With NEFWC no longer operating, MDCS has shifted to strengthening partnerships with other agricultural and community-based organizations. These collaborations help identify employers and MSFWs, coordinate outreach, and connect workers to employment, education, health, and supportive services. Through this expanded network, MDCS continues to provide coordinated and equitable MSFW services statewide in alignment with 20 CFR Part 653, Subpart B.

Review and public comment

Consistent with 20 CFR Subpart B, 653.107(d)(3), MDCS has given the opportunity to MSFW service providers, to comment on the *State Agricultural Outreach Plan*. MDCS was unable to include the New England Farm Workers' Council (NEFWC), WIA Section 167 grantee (due to their cessation of their operations). In addition, MDCS will be posting a draft copy of the Agricultural Outreach Plan on its website for public review and comment. Any comments received after the submission date will be forwarded to the region, under separate cover.

EOLWD through MDCS has maintained its compliance with 20 CFR 653.107–109 by implementing enhancements to its data systems — MOSES and MassHire JobQuest — to ensure accurate

identification of Migrant and Seasonal Farmworkers (MSFWs), consistent documentation of services, and reliable tracking of outreach activities. These system improvements position MDCS to more effectively monitor service delivery, assess outcomes, and verify that MSFWs receive services that are both quantitatively proportionate and qualitatively equivalent to those provided to non-MSFW customers.

To support accurate reporting of MSFW Equity-Ratio Indicators (ERIs), MDCS has completed key system and process updates that improve data capture and ensure alignment with federal reporting requirements. In addition to these upgrades, MDCS has developed a series of MOSES-based reporting tools specifically designed to measure MSFW Employment Service activity in alignment with the ERIs. These reports will enable managers and the State Monitor Advocate to review service patterns, outreach activity, and performance in real time, rather than relying solely on end-of-quarter summaries to identify trends or areas requiring attention.

MDCS has also implemented targeted staff training and updated guidance to promote consistent MSFW identification, proper intake procedures, and accurate data entry. These improvements directly support the State Monitor Advocate's responsibilities under 20 CFR 653.108 to oversee compliance, evaluate service delivery, and recommend corrective actions when necessary. As part of this plan, the State Monitor Advocate will use enhanced reporting tools and data systems to conduct ongoing, data-informed monitoring. This approach will allow the SMA to observe performance as it develops, identify potential weaknesses, and work proactively with local offices to address issues before they escalate. The integration of real-time monitoring into the SMA's oversight activities will strengthen the state's ability to maintain consistent alignment with federal standards. Together, these system upgrades, reporting tools, and staff development initiatives reflect MDCS's forward-looking commitment to equal access, continuous improvement, and accountability in serving MSFWs—fully aligned with the intent and requirements of 20 CFR Part 653, Subpart B.

INTRODUCTION

The MassHire Department of Career Services (MDCS) is responsible under the Wagner-Peyser grant to prepare an annual *Agricultural Outreach Plan (AOP)* as required by U.S. Department of Labor (DOL) regulations. This plan aligns with questions established by U.S. DOL for MDCS and extends to the MassHire Career Centers system in the provision of employment and training services to Migrant Seasonal Farm Workers (MSFW).

AOP The plan covers Federal Program Year 2020 (July 1, 2020 through June 30, 2024) and will remain in effect until updated. The plan was prepared in large part with the active participation of the State MSFW Outreach Specialist.

- 1. Assessment of Need. Provide an assessment of the unique needs of farmworkers in the area based on past and projected agricultural and farmworker activity in the State. Such needs may include but are not limited to: employment, training, and housing.**

Agriculture has long been an important part of MA economy. The industry has a significant direct and indirect economic impact on the State. Some of MA top commodities are cranberries, hay and haylage, corn, apples, and assorted field crops. Heavy activity months are from mid-March through late October. The majority of diversified agricultural operations continue to operate year-round.

Given the diversification of the agricultural operations in the State, it is likely that a handful of migrant workers will travel to Massachusetts to harvest crops in the next few years. Generally, producers satisfy their employment needs through the hiring of seasonal (local) workers that come from the neighboring communities and return to their permanent residence each day. The next significant source of workers come through the H-2A Visa Program. This last option, after a decade in decline has started to show gains on the number of workers being requested (560 workers in 2023). However, the demographics are changing, we see more Hispanic workers arriving through the H-2A Program than in the past.

Typical Characteristics of MSFWs in Massachusetts:

- ✓ Predominantly Spanish Speaking and/or English Language Learner (ELL).
- ✓ Country of origin includes: El Salvador, México, Guatemala, and Jamaica.
- ✓ U.S. born domestic workers include workers from Massachusetts, Connecticut, Rhode Island, New Hampshire, Vermont, and Puerto Rico.
- ✓ Common languages include Spanish and dialects from their country.
- ✓ Farmworkers are generally seasonal, migrants and for most diversified operations year-round workers.
- ✓ Approximately 560 migrant farm workers are H-2A non-immigrants workers.

Farmworkers, including MSFWs, have similar needs to other immigrant, refugee, and low wage earners:

Difficulties accessing services as agricultural work hours tend to be long (+/- 10/day) and do not always match typical health or agencies hours.

- ✓ Due to lack of a viable rural transportation infrastructure, assistance with transportation to and from work or from service providers in the community.
- ✓ Assistance with language barriers (ESL, etc.) and opportunities to up-skill and find better employment options.
- ✓ Low minimum wage - \$8.00 for agricultural workers (State min. wage for most occupations is \$15.00).

Domestic (local U.S.) farmworkers tend to work year-round at the local farms and those that are engaged on seasonal employment tend to find other temporary jobs or wait to be called back by their previous agricultural employer.

2. **Provide an assessment of the agricultural activity in the State: 1) identify the top five labor-intensive crops, the months of heavy activity, and the geographic area of prime activity; 2) Summarize the agricultural employers' needs in the State (i.e. are they predominantly hiring local or foreign workers, are they expressing that there is a scarcity in the agricultural workforce); and 3) Identify any economic, natural, or other factors that are affecting agriculture in the State or any projected factors that will affect agriculture in the State.**

According to the MA Department of Agricultural Resources (MDAR), other important crops or activities are sweet corn, hay, apples, squash, wild blueberries, raspberries, and dairy products. Agricultural activities in Massachusetts are concentrated mostly in the Plymouth, Worcester, Middlesex, Franklin, and Hampshire counties, where approximately 8233* or 63% of all agricultural workers were employed. * 2017 NASS, Ag Census

MDCS top crop activities based on job orders filed and employment needs are listed below.

1. Greenhouse / Nursery – 75 workers
2. Vegetables – 260 workers
3. Poultry/ Dairy products – 50 workers
4. Apples – 200 workers
5. Tobacco (Broadleaf and shade) - 250 workers

For purposes of identifying MSFWs and to facilitate the data validation process, we have broken down the State into 5 different regions. Descriptions of each region's accessibility and crop makeup follows:

GREATER BOSTON (GB) - Ashby, Dracut, Framingham, Foxborough, and Weymouth area.

Routes 128, 93 and 2 are roads used to access some farms in the region. Drive time ranges from 20 minutes to 45 minutes from Boston. Includes Nursery, Vegetable, Apples, and berries crops.

SOUTHEAST REGION (SE) - Cape Cod and the Islands, Fall River, Attleboro, Provincetown area.

Routes 93, 495, 3 and 24 are roads used to access farms in this region. Drive time ranges from 30 minutes to 2 and 1/2 hours from Boston. Includes Nursery, Cranberry (only in this region), Vegetable and berries crops.

NORTHEAST REGION (NE) - Methuen, Ipswich, Saugus, Salisbury area. Route's 495, 95, 114, and 1 are roads used to access some farms in the region. Drive time ranges from 30 minutes to 1 hour from Boston. Includes Apple, Nursery, Vegetable, and small fruit crops.

CENTRAL REGION (CE) - Fitchburg, Worcester, Webster, and Brookfield area. Routes 2, 9, 191, 291, and the Mass Pike are roads used to access some of the farms in the region. Drive time ranges from 30 minutes to 1 and 1/2 hours. Includes Apple, Nursery, and Vegetable crops.

WESTERN REGION (WE) - Hadley, Feeding Hills, Shelburne, and Colrain area. Routes 2, 7, 116, 47, 202, I-90 (Mass. Pike), and I-91 are roads used to access some farms in the region. Drive time ranges from 1 and 1/2 hours to 3 hours. Includes Apple, Nursery, Berries, Tobacco (only region with tobacco), and Vegetable crops.

Post COVID pandemic, MA agricultural producers - as many other industries - are experiencing labor shortages. The number of H-2A workers is expected to continue to increase as finding local workers is becoming increasingly difficult. Projections are that there will be approximately 1,500 uncommitted agricultural workers traveling to Massachusetts in PY 2024 and beyond.

Other factors affecting the agricultural industry include:

- a. Demographic changes - the aging of the current workforce, the average age of agricultural producer has increased steadily from 54.9 years to 59.7 years, illustrating the aging of MA farm operator population.
- b. Labor shortages – As a result of the COVID -19 pandemic, the flow of migrant and non-immigrant (H-2A) visa holders slowed when international borders closed, and local travel restrictions were enacted.
 - a. H-2A workers - At the peak of the pandemic MA experienced a loss of 40% of the regular H-2A workforce coming to the State. Another consideration is the fact that most H-2A agricultural workers have come to the state for at least the last two and a half decades and many of them are getting up on age, thus, retiring and many won't be replaced.
 - b. Seasonal and migrant workers – local (seasonal) and (migrant) workers that follow the migrant stream from southern states to the New England region were adversely affected as well.

As a result of these restrictions agricultural producers were unable to hire enough workers and have no other choice but to cut crops in an effort to cut costs. However, as we leave behind the devastating effects of the pandemic, there are some bright spots. During the PY 22 – 23 season the number of H-2A workers coming to MA exceeded the average for the past decade and it is holding steady at 560 worker per year. Also, more workers from Hispanic descent are finding their way to MA through the migrant stream or the H-2A Visa Program.

- 3. Provide an assessment of the unique needs of farmworkers by summarizing Migrant and Seasonal Farm Worker (MSFW) characteristics (including if they are predominantly from certain countries, what language(s) they speak, the approximate number of MSFWs in the State during peak season and during low season, and whether they tend to be migrant, seasonal, or year-round farmworkers). This information must take into account data supplied by WIOA**

Section 167 National Farmworker Jobs Program (NFJP) grantees, other MSFW organizations, employer organizations, and State and/or Federal agency data sources such as the U.S. Department of Agriculture and the U.S. Department of Labor (DOL) Employment and Training Administration.

A review of the previous year's Migrant Seasonal Farm Worker (MSFW) activity in the State indicates the MSFW activity in MA is extremely low. At the end of the 4th quarter of PY' 2022, 28 of the approximately 84,000 registrants in the JobQuest system identified themselves as MSFWs. MassHire Career Center (MCC) staff primarily sees MSFW's from local area and Puerto Rico responding to H-2A job orders. MassHire Department of Career Center (MDCS) staff has also identified several workers from Mexico, Guatemala and El Salvador performing agricultural labor or services in the State. In recent years (2022 and 23), more Mexican workers (46) have come to MA under the H-2A Program. Most identified laborers (about 514) in the state came through the H-2A program* and as such are not included in the total MSFW count. The number of domestic U.S. (MSFWs) workers is difficult to estimate, and it would likely be understated as some of these workers follow the seasonal crops from State to State and cannot be easily located or may be incorrectly self-reported in JobQuest.

Most Massachusetts agricultural workers are foreign-born individuals from Mexico and other countries in Central America. However, over the last few decades, a number of these farmworkers have settled at local communities, fewer workers are migrating long distances from their home base to work (after COVID), and fewer tend to "follow-the-crops" as in the past. The number of dependents, immigrants working in agriculture has also fallen since many of the younger generations have attended school, have no language barriers, and have secured job opportunities outside the agricultural industry.

Some of the agricultural workforce in MA may meet the MSFW guidelines for identification, the number of which is estimated to be approximately 150 or less. This considers information from New England Farm Worker's Council (NEFWC) WIOA section 167 grantee and The Connecticut River Valley Farmworker Health Program (CRVFHP).

(*) § 502.10 - Definitions - H-2A worker means any temporary (nonimmigrant) foreign worker who is lawfully present in the U.S. to perform agricultural labor or services of a temporary or seasonal nature pursuant to sec. 101(a)(15)(H)(ii)(a) of the INA, as amended.

The table below shows the hiring trends experienced by agricultural producers for the 5-year period covering 2012 through 2017.

USDA, Census of Agriculture Data – (2022 data not yet available)

County	2012	2017	Change # of workers
	Workers	Workers	
Barnstable	557	512	- 45

Berkshire	566	582	+ 16
Bristol	659	928	+ 269
Dukes	157	263	+ 106
Essex	978	1187	+ 209
Franklin	1,490	1457	- 33
Hampden	1,406	902	- 504
Hampshire	1554	1267	- 287
Middlesex	1,940	1863	- 77
Nantucket	129	51	- 78
Norfolk	349	368	+ 19
Plymouth	2,311	1477	- 834
Suffolk	9	7	- 2
Worcester	1,825	2262	+ 437

Over the years, due to labor shortages, MA producers had to rely heavily on H-2A visas to supplement their employment needs. The H-2A population is almost exclusively from Jamaican descent.

The MSFW population consists of either: (1) long-time migrants who have been picking crops for years; or (2) persons of various backgrounds who are seeking to be part of an underground economy, which is difficult to trace for obvious reasons. For Program Year 22 U.S. DOL, CNPC certified 560 H2A positions for employers across the Commonwealth, with most activity reported to be in the counties of Worcester, Franklin/Hampshire and Hampden.

Massachusetts growing season begins in early to mid-March when nursery workers begin to arrive. Peak season is during July and August for harvesting vegetables berries and tobacco. The harvest season ends with the apple harvests in October. Data from the NASS Ag. Survey suggest that most MA farms continue to be family farms that tend to not employ outside labor.

4. Outreach Activities. The local offices outreach activities must be designed to meet the needs of MSFWs in the State and to locate and contact MSFWs who are not being reached through normal intake activities. Describe the State agency's proposed strategies for:

Contacting farmworkers who are not being reached by the normal intake activities conducted by the employment service offices.

Once hired, the Outreach Specialist (OS) will employ a variety of strategies to contact MSFWs who are not being reached by the normal intake activities conducted through the State's MCC network. The Outreach Specialist will regularly visit local farms to provide MSFWs with information on available employment services, offering brochures and handouts that describe where MCCs and other organizations and resources are located and how they can be accessed. OS will provide MSFWs with information related to bilingual assistance, educational and

training programs, health clinics, day care services, transportation resources, and services available at the WIOA Sec. 167 Grantee, as appropriate.

The OS will monitor JobQuest/MOSES to identify MSFWs who register remotely. When a potential MSFW is identified through JobQuest/MOSES, OS will contact the individual via phone, email, or letter to provide information on the full array of MCC services and invite participation. In addition, FLC staff will provide information on farmworker rights, the Complaint System, and support services to any H-2A workers and MSFWs they encounter during work site visits.

- 1. Providing technical assistance to outreach staff. Technical assistance must include trainings, conferences, additional resources, and increased collaboration with other organizations on topics such as one-stop center services (i.e., availability of referrals to training, supportive services, and career services, as well as specific employment opportunities), the Employment Service and Employment-Related Law Complaint System (“Complaint System” described at 20 CFR 658 Subpart E), information on the other organizations serving MSFWs in the area, and a basic summary of farmworker rights, including their rights with respect to the terms and conditions of employment.**

Technical Assistance for the Outreach Specialist will be provided by the State Monitor Advocate (SMA). The SMA will provide peer to peer training and accompany the OS on outreach visits and review outreach topics, such as MCC services, available job opportunities, the ES complaint system, and farmworker rights. In addition, the OS is expected to participate on U.S. DOL sponsored training and meetings, as well as in conferences and meetings held by MDAR, MDPH, MDEEP, NEFWC, NEAC, Migrant Health.

OS will review that labor law posters are available at worksites and assure that they are posted in the places where MSFWs have access to them. This is most effective method for communicating rights regarding terms and conditions for employment to MSFW since most posters are readily available in different languages. During outreach visits or field check visits MDCS staff will ensure that farmworkers have been given copy of their contracts and/or the approved job order and understand their rights and responsibilities per the terms and conditions of employment.

The Outreach Specialist will also be trained to identify “Apparent Violations” of employment law including terms and conditions of employment, housing and safety regulations and can provide MSFWs with information on their options, if violations are present. However, the Outreach Specialist, after training, will be able to act as a mediator and help resolve any present violation identified.

2. Increasing outreach staff training and awareness across core programs including the Unemployment Insurance (UI) program and the training on identification of UI eligibility issues.

Outreach workers and the State Monitor seek out opportunities to keep current with new trends in farming, monitoring publications and newsletters related to agriculture, as well as networking through outreach to various organizations at available public meetings.

Outreach staff are provided training concerning the unemployment insurance processes related to basic eligibility and applying for unemployment insurance benefits. Staff have access to the MA Unemployment Insurance guide that is posted online. Staff are trained to provide “meaningful assistance” around filing and claimant rights and responsibilities. These staff members provide UI claim-filing assistance, if requested or if the individual is identified as needing services due to barriers such as limited English proficiency, disabilities, or other barriers.

3. Providing outreach staff professional development activities to ensure they are able to provide high quality services to both jobseekers and employers.

To ensure high quality of services to both jobseekers and business, professional development opportunities are currently available for MCC as well as outreach staff. Outreach staff will be trained on job requirements within 30 days after hired. To ensure a positive customer experience, when MSFWs are actively working in the MCCs, the outreach workers will provide monthly reports to the State Monitor Advocate to assist in identifying professional development needs for both, local and outreach staff. The State Monitor advocate is responsible for continuously reviewing state-wide agricultural activities and the provision of labor exchange and training services to MCCs, partners, employers, and workers within agricultural communities.

4. Coordinating outreach efforts with NFJP grantees as well as with public and private community service agencies and MSFW groups.

5. Services provided to farmworkers and agricultural employers through the one-stop delivery system. Describe the State agency’s proposed strategies for:

A. Providing the full range of employment and training services to the agricultural community, both farmworkers and agricultural employers, through the one-stop delivery system. This includes:

- i. How career and training services required under WIOA Title I will be provided to MSFWs through the one-stop centers; and**

The goal of outreach is to contact MSFWs who are not reached by the normal intake activities of the MassHire Career Centers (MCCs). The State Outreach Specialist will provide outreach services to farmworkers at places they normally congregate, which may include work sites, labor camps, grocery stores, churches, and other partner agencies. The Outreach Specialist will explain the services that can be accessed at the local MCC and educates the farmworkers on their rights and responsibilities under Federal and State labor laws. Regarding employment services, the outreach staff encourage farmworkers to visit the nearest MCC to explore the services available to them. Currently MCCs provide services to all customer in-person but have also endeavored to provide virtual services and courses as needed.

The MCCs provide the following services to farmworkers:

- Information on registering for employment services which include access to workshops, employment resources, and training opportunities,
- Information on services available through MEFWC (WIOA 167 grantee),
- Information on training services such as ESL, and basic education available through the Career Center (virtual) or provided through other service providers in the community,
- Details and assistance on applying for UI, if applicable,
- Information on health care, transportation, and childcare services available through NEFWC
- Information about MA and federal labor laws and about their respective enforcement agencies.
- Information and assistance on filing complaints through the Employment Services (ES) Complaint System, and
- Resolution of “Apparent Violations” observed or uncovered by the MCC or outreach staff during their outreach visit.

The ES Complaint System is discussed with farmworkers as part of general outreach and is also discussed in PowerPoint presentations given to all workers. Furthermore, all customers entering any of our Career Centers will find 11x14” posters with the SMA’s contact information for complaints, and ES Complaint System flyers are shared with advocates and other partners.

ii. How the State serves agricultural employers and how it intends to improve such services.

Employers can take advantage of employment and training resources such as assistance with recruitment and hiring, job matching of potential applicants, workforce training grants and tax credit programs, etc.

Services for employers include:

- Access to qualified applicants

- Applicant pre-screening
- Posting of jobs
- Assistance with small and large-scale recruitment activities
- Help planning recruitment events
- Testing and assessment of job candidates
- Labor market information
- Information on training grants and tax credits

Other services include the certification of the Farm Labor Camps in cooperation with the Massachusetts Department of Public Health (DPH) for both ARS and H-2A employers. The Foreign Labor Certification (FLC) Unit staffs perform field checks and coordinate with the Chicago National Processing Center in addressing any concerns relative to the acceptance of the ETA 790s and any other issues related to the H-2A Program.

B. Marketing the Complaint System to farmworkers and other farmworker advocacy groups.

Annually, the State Monitor Advocate (SMA) provides training to MCC staff on the Employment Service Complaint System. Upon request, the State Monitor Advocate will participate at advocacy group meetings to highlight the availability of the Complaint System. MSFWs are advised of their right to file complaints during MCC or during outreach visits. There are also posters, at all MCCs, providing information about how to file complaints. Additionally, the outreach workers, as well as the State Monitor Advocate provide information about the complaint system to partners agencies to ensure that workers are made aware that they do not have to go to a Career Center to file a complaint.

C. Marketing the Agricultural Recruitment System for U.S. Workers (ARS) to agricultural employers and how it intends to improve such publicity.

MassHire Career Centers (MCCs) will market the Agricultural Recruitment System to all agricultural employers to ensure MA meets the regulatory requirements associated to the Agricultural Recruitment System (ARS). Most ARS marketing services will be accomplished by outreach staff and local business service staff. In addition, the SMA will continue to provide guidance and technical assistance to State local staff and will work closely with the Outreach Specialist and individual agricultural employers across the State.

Outreach personnel and business representatives continually seek for new opportunities to market the Agricultural Recruitment System. Most of the marketing of MCC services is accomplished through relationship building with the agricultural community via in person contacts, networking events, local office recruitment activities, job fairs and community engagement events. New outreach materials are being developed to provide information on services available to business and job seekers in the MCCs.

6. Other Requirements

- A. Collaboration.** Describe any collaborative agreements the State Workforce Agency (SWA) has with other MSFW service providers including NFJP grantees and other service providers. Describe how the SWA intends to build upon/increase collaboration with existing partners and establish new partners over the next four years (including any approximate timelines for establishing agreements or building upon existing agreements).

MDCS and the SMA recently signed a *Memorandum of Understanding (MOU)* with the New England Farm Worker's Council (NEFWC), the WIOA Section 167 grantee, to define the intent of both organizations to coordinate the provision of services to MSFW through the MassHire Career Center system and to minimize duplicative outreach efforts. The MOU requires participants to be registered with both organizations to participate in appropriate WIOA career and training services, allows for the sharing of information and collaboration on special projects, training, and professional development activities. MCC will be able to refer applicants to NEFWC for skills training and education (ESL classes).

- B. Review and Public Comment.** In developing the AOP, the SWA must solicit information and suggestions from NFJP grantees, other appropriate MSFW groups, public agencies, agricultural employer organizations, and other interested organizations. In addition, at least 45 calendar days before submitting its final AOP, the SWA must provide a proposed plan to NFJP grantees, public agencies, agricultural employer organizations, and other organizations expressing an interest and allow at least 30 days for review and comment. The SWA must: 1) Consider any comments received in formulating its final proposed AOP; 2) Inform all commenting parties in writing whether their comments have been incorporated and, if not, the reasons; therefore, and 3) Transmit the comments and recommendations received and its responses with the submission of the AOP.

- a.** The AOP must include a statement confirming NFJP grantees, other appropriate MSFW groups, public agencies, agricultural employer organizations and other interested employer organizations have been given an opportunity to comment on the AOP. Include the list of organizations from which information and suggestions were solicited, any comments received, and responses to those comments.

In accordance with 20 CFR Subpart B, 653.107(d)(3), MDCS has given the opportunity to the New England Farm Workers' Council (NEFWC), WIA Section 167 grantee, as well as other MSFW service providers, to comment on the State Agricultural Outreach Plan.

In addition, MDCS will be posting a draft copy of the Agricultural Outreach Plan on its website for public review and comment. Any comments received after the submission date will be forwarded to the region, under separate cover.

A. Data Assessment. Review the previous four years Wagner-Peyser Act data reports on performance. Note whether the State has been meeting its goals to provide MSFWs quantitatively proportionate services as compared to non-MSFWs. If it has not met these goals, explain why the State believes such goals were not met and how the State intends to improve its provision of services in order to meet such goals.

Previous 4 Years		FY2019		FY2020		FY2021		FY2022	
Indicators of Compliance		MSFW	Non-MSFW	MSFW	Non-MSFW	MSFW	Non-MSFW	MSFW	Non-MSFW
1	Total Number of customers.	48	124225	42	100942	18	67143	32	68640
2	Number of customers registering for service		124225		100942		67143		68640
3	Number of customers referred to jobs	5	7429	4	7256	0	4594	1	4481
4	Number of customers referred to non-agricultural jobs		7429		7256		4594		4481
5	Number of customers placed in agricultural jobs	8	318	9	327	8	266	3	184
6	Number of customers placed in non-agricultural jobs	17	79433	30	74616	19	53866	10	35829
7	Number of customers referred to training	1	5809	1	5162	0	4442	2	4882
8	Number of customers receiving career guidance	21	82341	23	61943	11	42136	17	45932
9	Number of customers receiving job development	36	108096	36	84292	12	55338	25	57851
10	Number of customers receiving testing	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
11	Number of customers referred to supportive services	1	2889	0	3052	0	1917	1	1954
12	Number of customers receiving some services/assistance	48	124216	42	100910	18	67138	32	68638

B. Assessment of progress. The plan must include an explanation of what was achieved based on the previous AOP, what was not achieved and an explanation as to why the State believes the goals were not achieved, and how the State intends to remedy the gaps of achievement in the coming year.

The progress made on services to MSFWs during the Program Years 2019- 2022 can best be described as times of making progress (recruitment of an Outreach Worker) with periods of delay. Ensuring that services be provided qualitatively equivalent and quantitatively proportionate compared to other job seekers continues to be a struggle. The following actions have been identified, and acted on by DCS, to support program outcomes:

- Training provided to MCCs on services to MSFWs
- Direct communication with agriculture employers regarding domestic MSFW referrals.
- Increase the number of MSFW placed on H-2A job orders.

- Designate a temporary staff member to conduct outreach activities.
- Engaged in positive recruitment to hire a permanent MSFW outreach staff.

MSFWs must be recognized in all career centers as a targeted population entitled to effective and equal access to the full range of workforce services. Federal regulations under the Judge Richey Court Order of 1974 mandate that MSFWs receive services on a quantitatively proportionate and qualitatively equivalent basis as those provided to non-MSFWs.

The MassHire Department of Career Services (MDCS) is working towards developing new processes and procedures to assist MCCs identify, report, and properly serve any MSFWs that walk into any of the Career Centers. This will ensure that those potential MSFWs customers that were not receiving services due to not having a complete registration properly recorded in the state's JobQuest/MOSES system will receive the necessary assistance for a complete and accurate registration that will help match them to agricultural job opportunities and other non-agricultural job listings.

The SMA has noted that field (MCC) staff do not sufficiently update and promote H-2A job listings with higher wages than the current State minimum wage to the local domestic workforce. To improve this, MDCS will ensure that those higher paying agricultural jobs are visible and accessible to walk-in customers as well as to those engaged in self-directed activities.

Staff providing outreach services will continue to be 1 bilingual MDCS, Central Office staff. To help ensure equity of service, the efforts of the MDCS Outreach worker may be supplemented by local office Business Service Representatives (BSRs), in areas of the state where significant migrant outreach/agricultural workloads warrant additional assistance. BSRs are based at local MassHire Career Center (MCCs) sites and bring to the customer the full array of core, intensive, and training services, as well as MCC service information relevant to the needs of the agricultural and food processing community to include, but not limited to WIA Title I, WIOA 167 grantee and other community-based programs. This is accomplished in large part through conducting employer-coordinated visits to fields and food processing facilities to meet with agricultural producers and to the extent possible meet with migrant workers and/or employers and provide service information at the beginning and close of the agricultural employment seasons.

In addition to the above listed activities, MDCS believes that the updates to JobQuest/MOSES database will improve data collection and thus the overall program outcomes. The State Monitor Advocate (SMA) will monitor implementation of this model in the coming years, working with MDCS/MCC staff, WIOA partners, and MSFW service providers across the state to ensure that services and the state's outreach goals are met.

C. State Monitor Advocate. The plan must contain a statement confirming the State Monitor Advocate has reviewed and approved the AOP.

In accordance with 20 CFR Subpart B, Sec. 653.107 and as prescribed by Region I guidance, the State Monitor Advocate participated in the preparation of the agricultural outreach plan and has been afforded the opportunity to approve and comment on the plan. Such review indicates that the plan has been prepared properly, omitting none of the prescribed requirements and properly describing the activities planned for providing services to both agricultural employers and migrant and seasonal farmworkers (MSFWs).

SERVICES PROVIDED TO MSFWs THROUGH THE MASSHIRE CAREER CENTERS

3.1 Overview

An extraordinary variety of employment-related services for job seekers, including MSFWs, and businesses are available at the Commonwealth's network of MassHire Career Centers (MCCs).

Services for job seekers include:

- Job search assistance and access to online job listings
- Career counseling
- Coaching on job search skills
- Workshops on a variety of job search strategies
- Access to resources including PCs, reference materials, resume building software, and economic data
- Networking groups
- Unemployment insurance walk-in services

Always, job seekers can access career planning assistance services, including working with experienced career counselors, attending workshops and short-term training, developing a resume, writing a cover letter(s), and more.

In many MCCs, services are available in languages in addition to English. Depending on location, these languages may include Spanish, Chinese, Portuguese, Russian, Vietnamese, etc.

SERVICES PROVIDED TO EMPLOYERS THROUGH MASSHIRE CAREER CENTERS

Overview:

Employers can take advantage of employment and training resources such as assistance with recruitment and hiring, job matching with potential hires, workforce training grants and tax credit programs, etc.

Services for employers include:

- Access to qualified applicants
- Applicant pre-screening
- Posting of jobs

- Assistance with small and large-scale recruitment activities
- Help planning job fairs
- Testing and assessment of job candidates
- Targeted mailings
- Rental of conference rooms
- Labor market information
- Information on training grants and tax credits

Some Career Centers provide training - PC, word processing, for example - on-site at the center. Not all services are available at all career centers.

REVIEW AND COMMENTS

Public Comments

In accordance with 20 CFR Subpart B, 653.107(d)(1), (2), and (3), MDCS has given the opportunity to the New England Farm Workers' Council (NEFWC), WIOA Section 167 grantee, to comment on the State Agricultural Outreach Plan. Any comments received after the submission date will be forwarded to the region, under separate cover.

APPENDICES:

Facts and Statistics

See Attachment F

Figure 60: Principal Agricultural Products by County

Principal Agricultural -Products by County *	
County	Products
Norfolk	Nursery and Greenhouse
Plymouth	Fruits, Nuts, and Berries
Middlesex	Nursery and Greenhouse
Essex	Nursery and Greenhouse
Dukes	Nursery and Greenhouse
Bristol	Nursery and Greenhouse
Berkshire	Livestock and Vegetables

Hampden	Nursery and Greenhouse
Barnstable	Aquaculture and Livestock
Worcester	Nursery and Greenhouse
Franklin	Nursery, Greenhouse, and Livestock
Hampshire	Vegetables and Livestock

* Information based on the USDA, NASS, 2007 Census of Agriculture
Information obtained from the USDA NASS New England Agricultural Statistics - 2011 Report

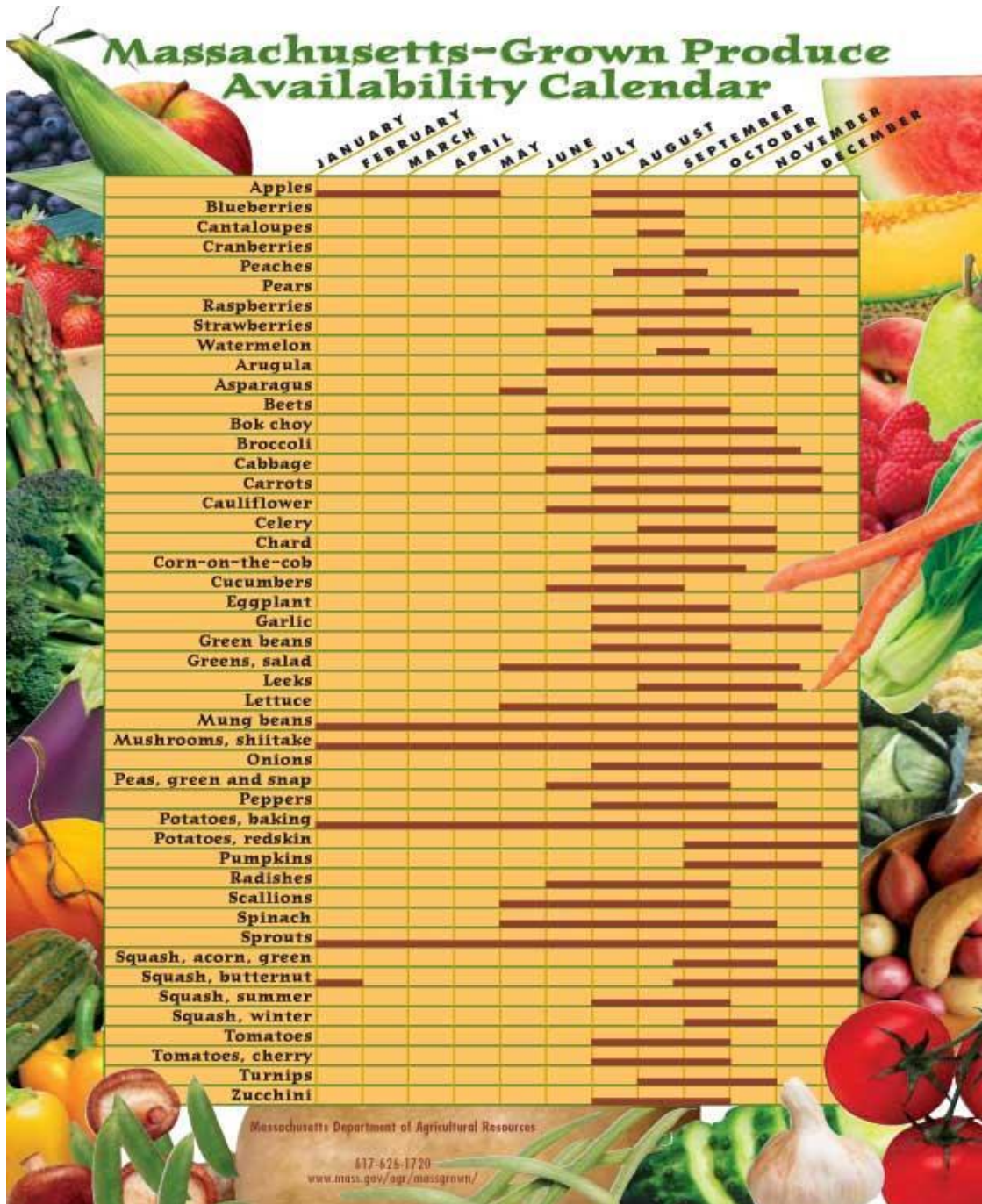
Figure 61: Major Agricultural Products in Each County

Major Agricultural Products by County *	
Barnstable	Hampden
1. Livestock, poultry, and their products	1. Nursery, greenhouse, floriculture
2. Aquaculture	2. Tobacco
3. Fruits, tree nuts, berries	3. Livestock, poultry, and their products
4. Nursery, greenhouse, floriculture	4. Vegetables, melons, potatoes
5. Vegetables, melons, potatoes	5. Dairy
Berkshire	Hampshire
1. Livestock, poultry, and their products	1. Vegetables, melons, potatoes
2. Dairy	2. Livestock, poultry, and their products
3. Nursery, greenhouse, floriculture	3. Dairy
4. Vegetables, melons, potatoes	4. Tobacco
5. Cattle and calves	5. Nursery, greenhouse, floriculture
Bristol	Middlesex
1. Nursery, greenhouse, floriculture	1. Nursery, greenhouse, floriculture
2. Livestock, poultry, and their products	2. Livestock, poultry, and their products
3. Fruits, tree nuts, berries	3. Other animals and other animal products
4. Vegetables, melons, potatoes	4. Vegetables, melons, potatoes
5. Dairy	5. Fruits, tree nuts, berries
Dukes	Norfolk
1. Nursery, greenhouse, floriculture	1. Nursery, greenhouse, floriculture
2. Livestock, poultry, and their products	2. Livestock, poultry, and their products
3. Vegetables, melons, potatoes	3. Horses, ponies, mules, burros, and donkeys
4. Cattle and calves	4. Other crops and hay
5. Poultry and eggs	5. Sheep, goats, and their products
Essex	Plymouth
1. Nursery, greenhouse, floriculture	1. Fruits, tree nuts, berries
2. Livestock, poultry, and their products	2. Nursery, greenhouse, floriculture
3. Vegetables, melons, potatoes	3. Livestock, poultry, and their products
4. Fruits, tree nuts, berries	4. Aquaculture
5. Dairy	5. Vegetables, melons, potatoes
Franklin	Worcester

1. Livestock, poultry, and their products	1. Livestock, poultry, and their products
2. Nursery, greenhouse, floriculture	2. Nursery, greenhouse, floriculture
3. Dairy	3. Fruits, tree nuts, berries
4. Vegetables, melons, potatoes	4. Dairy
5. Aquaculture	5. Poultry and eggs

* Information based on the USDA, NASS, 2007 Census of Agriculture,
Information obtained from the UMASS Extension Service and NASS 2011 Report

Figure 62: Massachusetts Grown Produce Availability Calendar *



* MA Department of Agricultural Resources

State strategy

(3) Services provided through OSCC system

Services provided to farmworkers and agricultural employers through the One-Stop delivery system. Describe the activities planned for providing the full range of employment and training services to the agricultural community, both farmworkers and agricultural employers, through the One-Stop delivery system. Describe the State agency's proposed strategies for:

Providing the full range of employment and training services to the agricultural community, both farmworkers and agricultural employers, through the One-Stop delivery system. This includes:

- a. How career and training services required under WIOA Title I will be provided to MSFWs through the One-Stop Career Centers;
 - ii. How the State serves agricultural employers and how it intends to improve such services.
- (B) Marketing the employment service complaint system to farmworkers and other farmworker advocacy groups.
- (C) Marketing the Agricultural Recruitment System to agricultural employers and how it intends to improve such publicity.

For Services provided - Please see *Section 3* in the *AOP Plan* above.

Other Requirements.

State Monitor Advocate

State Monitor Advocate. The plan must contain a statement confirming the State Monitor Advocate has reviewed and approved the *AOP*.

In accordance with 20 CFR Subpart B, 653.107 and as prescribed by Region I, the State Monitor Advocate participated in the preparation of the agricultural outreach plan and has been afforded the opportunity to approve and comment on the plan. Such review indicates that the plan has been prepared properly, omitting none of the prescribed requirements and properly describing the activities planned for providing services to both agricultural employers and migrant and seasonal farmworkers (MSFWs).

Review and Public Comment

In developing the AOP, the SWA must solicit information and suggestions from NFJP grantees, other appropriate MSFW groups, public agencies, agricultural employer organizations, and other interested organizations. In addition, at least 45 calendar days before submitting its final AOP, the SWA must provide a proposed plan to NFJP grantees, public agencies, agricultural employer organizations, and other organizations expressing an interest and allow at least 30 days for review and comment. The SWA must: 1) Consider any comments received in

formulating its final proposed AOP; 2) Inform all commenting parties in writing whether their comments have been incorporated and, if not, the reasons therefore; and 3) Transmit the comments and recommendations received and its responses with the submission of the AOP.

The AOP must include a statement confirming NFJP grantees, other appropriate MSFW groups, public agencies, agricultural employer organizations and other interested employer organizations have been given an opportunity to comment on the AOP. Include the list of organizations from which information and suggestions were solicited, any comments received and responses to those comments.

For Review and Public Comment - Please see *Section B* in the Plan above.

Collaboration. Describe any collaborative agreements the SWA has with other MSFW service providers including NFJP grantees and other service providers. Describe how the SWA intends to build upon/increase collaboration with existing partners and in establishing new partners over the next four years (including any approximate timelines for establishing agreements or building upon existing agreements).

The MassHire Department of Career Services (MDCS) will continue to coordinate activities and services with the WIOA Section 167 National Farmworker Jobs Program (NFJP) grantee, the New England Farm Workers Council (NEFWC), to identify MSFW needs, and to facilitate or provide intensive and training services. This will be facilitated by a Memorandum of Understanding. MDCS and NEFWC have an executed MOU. Other cooperative agreements with the Mass Migrant Education Program and the Connecticut River Valley Farmworker Health Program (CRVHP) are anticipated to be in place within the next year. MDCS welcomes engagement among other community based and/or private groups for the purpose of identifying, servicing, and assisting MSFWs.

MassHire Career Centers offer integrated and universally accessible employment services that efficiently meet the needs of all customers including Migrant and Seasonal Farmworkers (MSFW) and Limited English Proficient (LEP) customers. Through existing local partnerships in the MassHire Career Centers, MSFWs have access to the following services through a single service delivery system: labor exchange services such as career counseling, vocational testing, Veteran's employment, and training services, resume writing, job search assistance workshops, reemployment workshops, referrals to ESL classes and job referrals. Other One-Stop services include adult, dislocated worker, and youth services under WIOA, adult education, apprenticeship training, Unemployment Insurance, and referral to supportive services. This approach facilitates access to core services and reduces the number of barriers otherwise faced by MSFWs and LEP customers and individuals with disabilities. Some of the partners working under the MassHire Workforce System are co-located or have access to information through existing MOUs.

Currently MassHire Career Center (MCC) staff encourage MSFWs and LEP customers to take advantage of the free ESL classes offered through Massachusetts Adult Literacy Hotline, Migrant Education (EDCO) or through the WIOA Section 167 Grantee. This is a critical component for developing the basic skills needed to secure sustainable employment and pursue career growth. Building on the existing infrastructure and with the development of new collaborative efforts we expect to reduce the barriers to accessing services by this targeted population.

The SMA will continue to reinforce positive relationships with farm workers, farmers, Community Based Organizations (CBOs), Legal Services and other non-profit organizations while conducting outreach activities. During the next four years, Massachusetts' MDCS will strive to continue to build new and better relationships with MSFW/LEP service providers and plans to continue outreach to local farms to contract local workers and employers and promote the full range of services offered through the MassHire Career Center system.

Other activities being developed to attract new partners and retain existing service providers, include:

- Develop, and implement strategies which incorporate goals and objectives consistent with the WIOA requirements.
- Establish, and maintain communication through meetings and social media with stakeholders to keep them informed of the work and progress made.
- Advocate for the inclusion of the WIOA 167 grantee at MCCs locations across the state, per the direction established by the WIOA statutory requirements.
- Continue to foster good working relationships and collaborative efforts with stakeholders to help achieve the MDCS and AOP goals.

In addition, the State Monitor Advocate (SMA) is committed to building stronger partnerships and collaborations to better align services available at local workforce areas to the needs of MSFWs and agricultural employers. As part of this effort, the State Monitor Advocate links with the Connecticut River Valley Farmworker Health Program (CRVFHP) and became a member of the CRVFHP Advisory Council. The CRVFHP Advisory Council provides insight and guidance on issues affecting the accessibility of health care for agricultural workers and their dependents, along with identifying population shifts, changes to the regulatory framework, and other concerns affecting the agricultural community.

MDCS and the SMA will continue to promote stronger collaborative efforts with other State Agencies, such as the Massachusetts Department of Elementary and Secondary Education, ORI, Agriculture, Public Health, USDA Rural Development, and non-for-profit organizations such as CRVFHP, Massachusetts Farm Bureau Federation, etc. to

address and discuss issues regarding employment, literacy, health, and wellbeing of Massachusetts agricultural workers.

Assessment of progress. The plan must include an explanation of what was achieved based on the previous AOP, what was not achieved and an explanation as to why the State believes the goals were not achieved, and how the State intends to remedy the gaps of achievement in the coming year.

Please see *Sections 1.1 - 1.4 in the Plan* above.

Data Assessment. Review the previous four years Wagner-Peyser data reports on performance. Note whether the State has been meeting its goals to provide MSFWs quantitatively proportionate services as compared to non-MSFWs. If it has not met these goals, explain why the State believes such goals were not met and how the State intends to improve its provision of services in order to meet such goals.

Please see *Sections 1.1 - 1.4 in the Plan* above.

See the *2017 Census of Agriculture State Profile for Massachusetts (Attachment F)*

Wagner-Peyser Assurances

Massachusetts' state plan continues to include required assurances.

WAGNER-PEYSER ASSURANCES

ASSURANCES	
1.	The Wagner-Peyser Employment Service is co-located with One-Stop Centers, or a plan and timeline has been developed to comply with this requirement within a reasonable amount of time. (sec 121(e)(3)); The Commonwealth of Massachusetts Wagner Peyser Employment Service has been co-located within a One-Stop Career Center since the implementation of the Workforce Investment Act of 1998 effective July 1, 2000.
2.	If the state has significant MSFW one-stop centers, the State agency is complying with the requirements under 20 CFR 653.111 (State agency staffing requirements) if the State has significant MSFW One-Stop centers. MSFW activity in the Commonwealth accounts for less than 20% nationally, Therefore, Massachusetts is not subject to the requirements at 20 CFR 653.111. However, the Outreach Specialist and the State Monitor Advocate are from a background representative of the MSFW population in the state.
3.	If a State Workforce Development Board, department, or agency administers State laws for vocational rehabilitation of persons with disabilities, that board, department, or agency cooperates with the agency that administers

	Wagner-Peyser services, Adult and Dislocated Worker programs and Youth Programs under Title I; and The Commonwealth assures that the Massachusetts Rehabilitation Commission and the Massachusetts Commission for the Blind, which administer State Laws for vocational rehabilitation of persons with disabilities have cooperated in full and are a Core Partner with the MassHire Department of Career Service who is responsible for the administration of Wagner Peyser and WIOA Title I Adult, Youth and Dislocated Worker Programs.
4.	If a state chooses to provide certain ES activities without merit staff, it remains incumbent upon SWA officials to carry out the following activities if they arise: 1) Initiate the discontinuation of service(s); 2) Make the determination that services need to be discontinued; 3) Make the determination to reinstate services after the services have been discontinued; 4) Approve corrective action plans; 5) Approve the removal of an employer's clearance orders from interstate or intrastate clearance if the employer was granted conditional access to ARS and did not come into compliance within 5 calendar days; 6) Enter into agreements with state and Federal enforcement agencies for enforcement-agency staff to conduct field checks on the SWA's behalf (if the SWA so chooses); and 7) Decide whether to consent to the withdrawal of complaints if a party who requested a hearing, wishes to withdraw its request for hearing in writing before the hearing. The Commonwealth agrees.

ADULT EDUCATION AND FAMILY LITERACY PROGRAMS

TWO YEAR UPDATE

The Massachusetts Adult Education (AE) State Plan is oriented within a workforce-oriented adult education system designed to prepare adult learners for employment, postsecondary education, and career advancement. Massachusetts positions adult education content standards as foundational workforce infrastructure, ensuring adult learners gain the academic, digital, and problem-solving skills needed to enter, persist in, and advance along industry-validated career pathways, including Integrated Education and Training (MassSTEP), employer-engaged training models, Registered Apprenticeships, and postsecondary education.

All initiatives are grounded in the Adult and Community Learning Services (ACLS) mission and vision and reflect the priorities of the Workforce Innovation and Opportunity Act (WIOA), including workforce preparation, career pathways, and measurable skill gains. Curriculum, instruction, and assessment are aligned to statewide standards to promote rigor, relevance, and continuous improvement.

- Programs offering Adult Basic Education (ABE) implement curriculum aligned to the College and Career Readiness Standards for Adult Education (CCRSAE). Programs offering English for Speakers of Other Languages (ESOL) implement curriculum aligned to the Massachusetts English Language Proficiency Standards for Adult Education (MA ELPS). These standards support workforce readiness by integrating academic and language instruction with real-world applications aligned to labor market demand.
- The plan focuses on local adult education services as workforce on-ramps, particularly for individuals disconnected from the labor market, by integrating instruction, digital literacy, advising, and transition supports that lead to employment, postsecondary education, or industry-recognized credentials associated with economic self-sufficiency. Additionally, the plan supports adult education in correctional institutions and supports workforce reentry by accelerating skill development for individuals preparing to rejoin the labor market. These services increase labor force participation while reducing recidivism and long-term public costs. Programs emphasize academic skill development, career pathways, and transition planning in coordination with workforce partners. MassSTEP ESOL will prioritize an industry-driven, outcome-focused model that combines English language acquisition with workforce preparation and employer-aligned training resulting in credential attainment and employment with a focus on employer validation, alignment

to regional labor market demand, and clear pathways to jobs that lead to economic self-sufficiency.

ACLS uses state leadership funds to support system integration, instructional quality, and accountability across the adult education system. Massachusetts uses performance data, enrollment targets, and measurable skill gains to direct resources toward effective providers and to intervene when outcomes fall below expectations. Professional development and technical assistance strengthen instructional quality, advising, and leadership capacity tied to workforce outcomes. ACLS leverages flexibility within WIOA and state authority to pilot accelerated, virtual, and employer-engaged models that adapt to changing labor market needs.

Massachusetts maintains a comprehensive accountability framework that includes performance targets, enrollment monitoring, program quality reviews, site visits, and continuous improvement planning. Together, these accountability mechanisms ensure public investment in adult education delivers measurable workforce outcomes while maintaining consistent access across the Commonwealth.

The *State Plan* must include a description of the following as it pertains to Adult Education and Literacy programs under title II, the Adult Education and Family Literacy Act (AEFLA).

PROGRAM-SPECIFIC REQUIREMENTS FOR ADULT EDUCATION AND FAMILY LITERACY ACT PROGRAMS

A. ALIGNING OF CONTENT STANDARDS

The activities described in this *Massachusetts Adult Education (AE) State Plan* take place in the context of overarching themes and “big ticket” initiatives that drive our decisions and actions moving forward. All initiatives are grounded in the Adult and Community Learning Services (ACLS) revised AE mission and vision to reflect WIOA priorities, integrate diversity, equity, and inclusion (DEI) that demonstrate our shared commitment to the education and workforce success of adult learners in Massachusetts. The new adult education mission and vision for Massachusetts can be found [here. doe.mass.edu/acsls/](https://doe.mass.edu/acsls/)

In February 2022 ACLS launched a statewide professional learning series on anti-racism, diversity, equity, and inclusion (ADEI) to ACLS staff, advising and instructional staff, program leaders, and contracted PD providers across all AE organizations and programs and continues to engage with the adult education field in these professional development series.

ACLS has also embarked on an intensive process under the guidance of the [DESE Office of Planning and Research doe.mass.edu/research/](https://doe.mass.edu/research/) to expand and deepen the theory of action from the last funding cycle and create system goals for the new five-year funding cycle starting in PY23. Using the current levers of change (i.e., providing high-quality professional development, providing indicators of program quality and policies, and conducting program quality reviews), ACLS’ goal is to professionalize the field of adult education while creating a

more equitable adult education system by (1) improving access to full-time positions, (2) promoting educational leadership stability and learning, (3) focusing on curriculum support and incentives, and (3) reviewing and analyzing existing data in order to generate a higher-quality educator workforce as well as higher-quality programs, which will result in improved student outcomes.

ACLS is also responsive to the continued increasing need for ESOL services in Massachusetts and committed to expand adult education services including virtual options and access. The *Open and Competitive Request for Proposals (O&C RFPs)* conducted in 2023 for the funding cycle starting PY23 allowed the Community Adult Learning Centers to offer adult education services through a variety of delivery methods (in-person, hybrid) as well as a statewide [virtual learning school system \(doe.mass.edu/grants/2022/538/\)](https://doe.mass.edu/acls/MassLINKS/default.html) [MassLinks](https://doe.mass.edu/acls/MassLINKS/default.html).
doe.mass.edu/acls/MassLINKS/default.html

In addition, ACLS embarked on an Adult Education marketing campaign which was launched in April 2023 and ran through June 2023. The goal of the campaign was to create a state-wide public adult education awareness to reach prospective students and recruit the best educators into the adult education field. The campaign promoted adult education service opportunities throughout the Commonwealth in a manner that was visually appealing, inclusive, and inviting to the public. The campaign tag line was **To Live & Learn** which was also incorporated into a new adult education logo in Massachusetts, our new [landing page for adult education](https://publicadulthoodeducationma.org/), <https://publicadulthoodeducationma.org/> and all promotional materials. The campaign featured adult education students on static billboard posters, digital billboards, gas station TV, social media ads, short videos (LinkedIn, Instagram, Facebook, and X (Twitter)). All information was in English and Spanish with QR codes. After the campaign ended, ACLS continues to utilize social media for public awareness. The campaign resulted in favorable increase of inquiries for adult education services across the Commonwealth. Plans to further expand the brand awareness and marketing campaign are in the early planning stages.

The Massachusetts adult education system has been built on learning standards to which curriculum, instruction, and assessment are required to be aligned. The standards provide clear expectations for students, teachers, and other stakeholders. They also provide a focus for educator growth leading to improved teaching. Building on a foundation of clear expectations and educator effectiveness, standards support higher and deeper levels of learning for student. Comprehensive information on curriculum and instructional policies, standards, guides, and other resources can be found on the [curriculum and instruction webpages](https://doe.mass.edu/acls/frameworks/default.html).
doe.mass.edu/acls/frameworks/default.html The following are some examples of ALCS efforts to ensure aligning of content standards:

1. Since October 2013, programs offering ABE instruction in mathematics and English Language Arts/Literacy (ELA), including approved forms of distance education, are required to implement curriculum aligned to the [CCRS&E](#).

<https://lincs.ed.gov/publications/pdf/CCRStandardsAdultEd.pdf> ABE curriculum and instruction are required to reflect the instructional shifts and align at all levels with the CCRSAE <https://lincs.ed.gov/publications/pdf/CCRStandardsAdultEd.pdf> levels A through D-E.

2. Since February 2019, programs offering ESOL instruction, including approved forms of distance education, are required to implement curriculum aligned to the [Massachusetts English Language Proficiency Standards for Adult Education](https://doe.mass.edu/acls/frameworks/frameworks.html) doe.mass.edu/acls/frameworks/frameworks.html (MA ELPS) doe.mass.edu/acls/frameworks/frameworks.html
3. These standards incorporate the CCRSAE <https://lincs.ed.gov/publications/pdf/CCRStandardsAdultEd.pdf> for ELA/Literacy and the instructional shifts for ELA and context them within the lens of English language learning.
4. Revised Indicators of Program Quality (IPQ) Standard 4 provides clear guidance around ACLS expectation for curriculum and instruction:
 - Indicator 4: Curriculum: Curriculum is standards-based, vertically and horizontally aligned in all content areas and levels, contextualized and relevant, and supports the diverse needs of all learners.
 - Standard 4.1: The program's documented ESOL curriculum and instruction are aligned to the Massachusetts English Language Proficiency Standards (MA ELPS). The program's documented ABE curriculum and instruction are aligned to the College and Career Readiness Standards for Adult Education (CCRSAE).
 - Standard 4.2: The program's curriculum is vertically and horizontally aligned in all content areas and levels, informed by qualitative and quantitative assessment data, revised regularly with staff, and implemented in all classrooms.
 - Standard 4.3 The program's curriculum is responsive to and inclusive of diverse identities 4 and cultures.
5. In PY23-24, ACLS resumes the Program Quality Reviews (PQRs) and has approximately 85 PQR visit scheduled during the funding cycle where every program will receive a program quality review: approximately 23 programs in PY23-24, 21 programs in PY24-25, 21 programs in year PY25-26, and 20 programs in year PY26-27. There are no PQRs scheduled in PY27-28 as ACLS will be issuing an Open and Competitive RFP for a new funding cycle during that year. The primary purpose of PQR's is to drive program improvement. The PQR focus this funding cycle is solely on Indicator #9 Educational Leadership. Standard 9.1, under this indicator, specifically focuses on how the program leaders evaluate instruction and ensure implementation of content standards in the classroom (9.1 Educational leaders use the adult education professional standards to provide on-going observation and supervision and ensure that all teachers design and deliver high-quality curriculum and instruction). All PQRs will be conducted in -person with some remote component (as needed). Upon the conclusion of a PQR, programs will receive a report, which will contain an individual rating for each of the three standards

of Educational Leadership, along with recommendations for continuous improvement. The summative report released annually will identify promising practices observed during PQRs as well as broad areas for improvement across all programs for each year and will be posted on ACLS website.

6. In PY23-24 ACLS also resumes site visits (SV) conducted by program specialists. Each program will annually get an in-person site-visit (unless the program is scheduled for a PQR visit). Site visits focus on selected IPQs based on program needs. Programs can use both PQR and SV reports to drive continuous improvement and as the basis for requesting professional development support including the Planning for Continuous Improvement offering.
7. The AE Professional Development (PD) System, historically known as SABES was also rebid in PY22-23 for a new five (5) year funding cycle. The PD system consists of five centers that collaborate with each other and ACLS to develop and provide high-quality PD and support to increase educator effectiveness and strengthen program. All five SABES centers participated in the ADEI trainings provided by ACLS and incorporate ADEI into their PD offerings. In PY23-24 selected members of all PD centers join ACLS in visiting programs to observe classes. The goal is for SABES staff to gather information from the classroom observations to be able to better support the field in providing content aligned high quality instruction. For more information on SABES, see *Section E, 1b*.
8. ACLS is currently in its third (final) year of the TSTM initiative with the intention of sustaining the initiative over time in partnership with SABES. In PY23-24 ACLS offers two types of TSTM professional development opportunities designed to increase rigor in curriculum and instruction: TSTM Customized Approach Academy and TSTM Train-the Trainer Academy. Each year the Academy provides participants with in-depth training on the TSTM framework. In addition to interested teachers participating in the Academy, the [TSTM Toolkit \(https://lincs.ed.gov/state-resources/federal-initiatives/teaching-skills-matter-adult-education/toolkit-overview\)](https://lincs.ed.gov/state-resources/federal-initiatives/teaching-skills-matter-adult-education/toolkit-overview) is available free of charge to all ABE and ESOL practitioners. ACLS encourages ABE and ESOL practitioners to explore the toolkit on their own and watch the SABES calendar for PD related to the three instructional approaches central to TSTM: integrated and contextualized learning, problem-based learning, and project-based learning. To learn more about TSTM and participating programs, visit the [TSTM webpage. doe.mass.edu/acls/frameworks/tstm.html](https://doe.mass.edu/acls/frameworks/tstm.html)
9. The Educator Growth and Effectiveness (EGE) System, modeled after the [Massachusetts K-12 Educator Evaluation Framework, doe.mass.edu/edeval/](https://doe.mass.edu/edeval/) is aligned to two sets of professional standards for AE: the [Massachusetts Professional Standards for Teachers of Adult Basic Education doe.mass.edu/acls/edueffectiveness/](https://doe.mass.edu/acls/edueffectiveness/) and the [Massachusetts Professional Standards for Teachers of Adult ESOL doe.mass.edu/acls/edueffectiveness/](https://doe.mass.edu/acls/edueffectiveness/) and enhanced by two [Proficiency Guides, \(doe.mass.edu/acls/edueffectiveness/\)](https://doe.mass.edu/acls/edueffectiveness/) one for Math teachers and one for ELA teachers. The proficiency guides identify the knowledge and skills needed to be an effective teacher in these content areas, including specific

language around the knowledge, skills, and classroom practices needed for CCRSAE-aligned curriculum and instruction, and focus on the needs of English learners, both those in ESOL classes and those in ABE classes. Dedicated modules for teachers, program directors, and coaches are completed after they participate in a “common module,” thus increasing the focus on the roles of each and reducing the total time required to participate in this PD offering.

10. The 2014 ESOL Professional Standards for Teachers were revised to reflect three state priorities for ESOL teacher effectiveness: integration of workforce preparation and digital literacy; integration of culturally responsive and sustaining practice; and support for instructional leadership, in particular teacher coaching and classroom observation. This updated version of the standards was released in February 2021.
11. *Good to Know Assessment Guides (GTK Assessment Guides)*. ACLS and the UMass Center for Educational Assessment: College of Education: UMass Amherst released the [GTK Assessment Guides, doe.mass.edu/acsl/assessment/default.html](https://doe.mass.edu/acsl/assessment/default.html) designed to facilitate conversations between students, teachers, and program directors so that students have a better understanding of standardized (NRS) assessment and meaningful assessment experiences. The GTK Assessment Guides: (1) provide basic information (e.g., what, why, when) on each NRS test approved for use in Massachusetts, (2) make the testing transparent for both teachers and students. (3) situate the testing in a comfortable context, (4) support implementation of the Massachusetts Professional Standards, in particular, [ESOL Professional Standard 5 doe.mass.edu/acsl/edueffectiveness/esol-prof-standards/index.html](https://doe.mass.edu/acsl/edueffectiveness/esol-prof-standards/index.html) and [ABE Professional Standards-Assessment Indicators, doe.mass.edu/acsl/edueffectiveness/prof-standards.pdf](https://doe.mass.edu/acsl/edueffectiveness/prof-standards.pdf) (5) teachers can use the GTK Assessment Guides to teach test-taking skills and familiarize students with the NRS test they take for pre/post. ACLS recommends that teachers modify and scaffold the content of the guides further for lower level ESOL. The guides are now available in English only but will also be made available in Spanish, Portuguese, and Chinese.

LOCAL ACTIVITIES

ADULT EDUCATION AND LITERACY ACTIVITIES (SECTION 203 OF WIOA)

ACLS has been actively engaged in collaborations with WIOA partners and other interested stakeholders. ACLS collaborates at the state level with core partners and has played a significant role in the development of the *Combined State Plan*. The ABE state director and an ACLS team leader are members of the WIOA Steering Committee which meets bi-weekly. In addition, several ACLS staff participate in WIOA workgroups. ACLS staff will continue cross-agency collaborations to ensure a successful implementation of the *State Plan* and with other core programs and one-stop partners.

ACLS staff participates in national WIOA activities organized by the U. S. Department of Education’s Office of Career and Technical Education (OCTAE) and/or the U.S. Department of Labor Employment and Training. For example, currently two ACLS staff members represent adult education in the Aligned Case Management Institute (ACMI). The purpose of this initiative

is for state WIOA partners to work together to discuss strategies for aligning case management systems across agencies that will lead to enhanced service delivery for shared customers across multiple WIOA partner agencies.

ACLS offers opportunities for local programs to learn about WIOA (e.g., WIOA content at annual Directors' Meeting and ACLS sponsored events, information shared through monthly communications with the field, AE local representation on WIOA workgroups and task forces).

1. All local programs funded under the Community and Adult Learning Services (CALCs) integrate the following services:
 - Educational and career advising supports students with the development of individual education and career plans as they pursue their college and career goals.
 - Level appropriate employability skills for students (e.g., workforce preparation, contextualized curricula, integration of job readiness skills).
 - Digital literacy in curriculum and instruction.
 - Workforce preparation activities which include but are not limited to: integration of college and career readiness culture in all programs; development of Individual Education and Career planning for students at all levels to promote college and career awareness; integration of job readiness skills (i.e., level-appropriate foundation skills) at all levels; integration of digital literacy at all levels to prepare adult learners for employment and further education and/or training; when applicable, for students in higher levels, curriculum contextualized to in-demand industries as identified in local plans; and in collaboration with workforce partners, further development and promotion of concurrent education and training opportunities through ITAs, participation in One-Stop Career Center (OSCC) training programs, and other integrated education and training models (known in MA as MassSTEP).
2. ACLS funds selected CALC programs in each local workforce area to provide direct service to MassHire Career Centers in the form of outstationed staff who help with intake, assessment, and referral of customers who need AE classes. ACLS outstationing funds are used to support programs in connecting career center customers with AE programs in the region and AE students with partner services to ensure that eligible AE students become "shared customers" with the workforce system and get the workforce services they need.
3. Program staff and directors collaborate on multiple levels and for multiple purposes. AE is represented on each statewide WIOA working group led by the workforce system. In each workforce region, one AE director is selected to represent AE on the local workforce board and AE directors are encouraged to participate in WIOA working groups and discussions of regional employment needs. ACLS continues to convene the MassHire Workforce Board AE representatives on a quarterly basis. Career center operations, adult education messaging, and local area collaborations are typical meeting agenda items. In addition, ACLS provides orientations to new representatives to help familiarize them with the role and responsibilities of the position.

4. ACLS supports the provision of family literacy and family engagement activities to help adult learners who are parents and caregivers achieve their goals as learners, workers, and community members as well as their goals as parents and caregivers. Data consistently show significant numbers of enrolled students who are parents of school-age children. Programs use multiple tools to integrate family literacy in programming including family-centered contextualized curriculum, family action plans, and family engagement activities, often in collaboration with early childhood programs and/or schools.
5. ACLS continues to fund a small number of programs to offer workplace education services which are funded in two phases: (1) planning and (2) implementation grants for applicants that conduct a successful planning process. During implementation, workplace education programs include AE and literacy activities concurrently with workforce preparation activities so that low-skilled incumbent workers can improve their skills and more easily advance to more high demand occupations with their current employers.

See chart below for PY22-23 counts for students served.

Category	Number of Students
ABE (GED/HiSet)/ESOL	5,951/16,157
Men/Women	7,661/14,447
Employed/Unemployed	11,421/7,540
Out-of-School Youth	3,350
In correctional institutions	1,341
Receiving public assistance	9,013
Parents with dependents <18	1,376

Digital Literacy and Distance Education

Digital Literacy and Professional Development

An essential component of a high-quality adult education program is the integration of digital literacy into curriculum and instruction. ACLS requires all programs to support the digital literacy development of students at every class level.

The Massachusetts professional development system, SABES, is responsible for supporting the digital literacy needs of the field with the SABES PSPDC taking the lead on PD and support to practitioners and programs that enables them to:

- use technology for their own professional purposes whether for in person or remote online services (e.g., for participating in PD, networking, and communities of practice)
- assist students in acquiring the digital literacy knowledge and skills necessary for achieving college and career readiness and success in the workforce
- offer rigorous online and/or remote learning opportunities to students

The responsibility for helping practitioners address the digital literacy and distance education needs of students belongs to the SABES C&I centers.

An Environmental Scan of Adult Education Digital Literacy Research

In 2023, Adult and Community Learning Services (ACLS) division commissioned an environmental scan of adult education digital literacy (AEDL) research. To complete this environmental scan and provide a comprehensive, stakeholder-driven review of AEDL practices, SageFox Consulting Group reviewed over 170 documents and spoke with 30 adult education educators and administrators, 12 workforce experts, and four students. At the heart of the environmental scan were the research questions listed below.

- What are the digital literacy skills needed in the 16 priority workforce industries that students need?
- Which currently available Standards support industry specific digital literacy skills?
- How would Massachusetts benefit from its own digital literacy standards for adult education?
- What do practitioners need to develop their own digital literacy proficiency? For that of their students?
- What kind of professional development would be the most effective to move the field (practitioners, students, staff) forward to greater proficiency?

The report concluded with several recommendations for ACLS that will be considered in informing the digital literacy work in PY23-27:

- identify the specific digital literacy standards to be used to ensure standards-aligned instruction and professional development,
- develop a policy to strongly recommend/require all local program staff to gain digital literacy proficiency based on the assessments and modules of the Northstar Digital Literacy standards,
- review the current digital education resources offered by the state to determine whether there are any student needs not being met by the currently help state offered resources.

Distance Education

Distance education is offered in Massachusetts through CALCs that select to offer remote classes to their students and the statewide virtual adult education academy [MassLinks doe.mass.edu/acls/MassLINKS/default.html](https://doe.mass.edu/acls/MassLINKS/default.html) that offers both online High School Equivalency (GED and HiSet) preparation classes and English for Speakers of Other Languages (ESOL/ESL) classes. MassLinks offers distance education to about 500 students at any given time during an academic year.

Request for Funding Proposal (RFPs)

The Massachusetts Department of Elementary and Secondary Education (DESE) administers the Adult Education and Family Literacy Services grants to Community Adult Learning Centers

(CALCs fund code 340/345/359), Adult Education in Correctional Institutions (fund code 285/563), and MassSTEP (IET/IELCE) (fund codes 661/667/359) consistent with Public Law 113-128, Sections 201 through 243, across 16 local workforce development areas for CALCs. Under WIOA, ACLS Adult Education eligible providers' services may include all of the following:

1. Adult education; 2) Family literacy activities; 3) English language acquisition activities; 4) Integrated English literacy and civics education; 5) Workforce preparation activities; or 6) Integrated education and training (IET) that provides adult education and literacy activities, concurrently and contextually with both, workforce preparation activities, and workforce training for a specific occupation or occupational cluster and is for the purpose of educational and career advancement.

Eligible agencies/organizations that have demonstrated effectiveness in providing adult education and literacy services, including agencies that have not previously been funded by DESE, are eligible to apply.

Eligible Agency: An organization that has demonstrated effectiveness in providing adult education and literacy activities that may include:

1. a local educational agency
2. a community-based organization or faith-based organization
3. a volunteer literacy organization
4. an institution of higher education
5. a public or private nonprofit agency
6. a library
7. a public housing authority
8. a nonprofit institution not described in any of subparagraphs (1) through (7) and has the ability to provide literacy activities to eligible providers
9. a consortium or coalition of the agencies, organizations, institutions, libraries, or authorities described in (1) through (8)
10. a partnership between an employer and an entity described in any of (1) through (9)

Note: As required by WIOA the applicant must demonstrate past effectiveness by submitting past performance data in serving eligible participants.

Consistent with WIOA Subpart C, 463.24, to be considered eligible for an award, an applicant must demonstrate past effectiveness by providing performance data reflecting student outcomes. The determination considers a program's record of improving the skills of eligible individuals who have low levels of literacy, in the content domains of reading, writing, mathematics, English language acquisition, and other subject areas relevant to the services contained in the State's application for funds. An eligible provider must also provide

information regarding its outcomes for participants related to employment, attainment of secondary school diploma or its recognized equivalent, and transition to postsecondary education and training.

There are two ways in which an eligible provider may meet the requirements:

1. An applicant that is a current Adult Education grantee must provide performance data from the state-administered adult education Management Information System (MIS) to demonstrate past effectiveness.
2. An applicant that is not a current Adult Education grantee must provide performance data to demonstrate its past effectiveness in serving basic-skills-deficient-eligible individuals as defined by the applicant.

In awarding grants or contracts for adult education and literacy activities to eligible providers, DESE must consider the *13 WIOA Considerations* (ecfr.gov/current/title-34/subtitle-B/chapter-IV/part-463/subpart-C/section-463.20) (Sec 231).

Eligible agencies awarded adult education grants must:

Design, implement, and evaluate adult education services guided by the:

- 13 WIOA Considerations
- Massachusetts Policies for Effective Adult Education in Community Adult Learning Centers and Correctional Institutions
- Massachusetts Indicators of Program Quality
- *WIOA Massachusetts Combined State Plan and Local Area Plans*

The application process used for adult education funds is uniform to ensure a standardized approach to the review of proposals and awarding of funds. RFPs are advertised on social media, the state website, and the procurement site, and via notifications sent out through department mailings. All current providers and other potential applicants that request information prior to the announcement receive information on the same day as the social media notice. All eligible applicants go through the same application and review process and have direct and equitable access to apply and compete for title II grants and contracts, including *WIOA Sections 225 (Corrections), 231 (Grants) and 243 (IEL/Civics)*.

ACLS completed a rebid of all services in PY22 for a new five (5) year funding cycle starting in PY23 through an open and competitive *Request for Proposals (RFP)* and *Request for Responses (RFR)*. Massachusetts-distributed AEFLA funds to provide adult education and literacy services in all 16 workforce regions of the Commonwealth.

The *Open and Competitive Request for Proposals (RFP)* process consisted of two separate competitive processes.

A regional competition made funding available for Community Adult Learning Centers (CALCs) offering ABE and/or ESOL services, which may also include family literacy services. The regional allocations were determined using a formula that considers data from the American Community

Survey. Successful applicants were awarded funding based on the quality of their responses to the 13 considerations in *Title II of WIOA*. They were also awarded points based on past performance. The regional competition was reviewed for alignment with local plans by local boards.

A statewide competition made funding available for programs that may include adult education in correctional institutions (AECI), workplace education, MassSTEP (IET/ IELCE) and a virtual adult education academy MassLinks. Applicants competed for funds based on a statewide allocation and were awarded funding based on the quality of their responses to the 13 considerations in Title II of WIOA without regard to the workforce regions in which they are located.

Funds must be used in accordance with [FY24-FY28 Massachusetts Policies for Effective Adult Education in Community Adult Learning Centers and Correctional Institutions](#) doe.mass.edu/acls/abeprogram/ to provide adult education to eligible students; eligible students are:

- are at least 16 years of age;
- are not enrolled or required to be enrolled in secondary school under state law; and
- do not have a secondary school diploma or its recognized equivalent and have not achieved an equivalent level of education; or are basic skills deficient; or are English language learners.

ACLS funded the following services for the PY23-PY27 funding cycle:

- Eighty (80) Community Adult Learning Centers (CALCs) offering ESOL and/or ABE services.
- Six (6) MassSTEP ABE providers offering adult education (AE) concurrently and contextually with workforce preparation activities and workforce training to accelerate learning outcomes, including student attainment of a high school credential and one or more relevant industry-recognized credentials (IRCs). A comprehensive list of MassSTEP ABE services and types of funded programs can be found on the [MassSTEP website](https://doe.mass.edu/acls/MassSTEP/default.html). doe.mass.edu/acls/MassSTEP/default.html
- Two (2) workplace education programs offering instructional services at a workplace for eligible adults (incumbent workers) in basic reading, writing and numeracy, pre-adult secondary (Pre-ASE), and adult secondary education (ASE) including preparation for high school equivalency certification. English for Speakers of other languages (ESOL) instruction may also be provided for limited-English proficient adults. Instructional services are provided through partnerships among businesses, labor organizations, and adult education providers. Projects are supported with a combination of primarily state and local matching resources for up to three years.
- One (1) statewide virtual adult education academy [MassLinks](https://doe.mass.edu/acls/MassLINKS/default.html) doe.mass.edu/acls/MassLINKS/default.html offering online High School Equivalency (GED and HiSet) preparation classes or English for Speakers of Other Languages (ESOL/ESL) classes.

A. CORRECTIONS EDUCATION AND OTHER EDUCATION OF INSTITUTIONALIZED INDIVIDUALS

Massachusetts used applicable WIOA considerations specified in section 231(e) to fund eligible providers in correctional institutions to establish/operate programs that provide adult education and literacy activities under Section 225.

ACLS currently supports the operation of ABE services in Massachusetts' county houses of corrections (CHCs).

In prior years, these WIOA funded programs in correctional institutions offered AE and literacy and numeracy activities with emphasis on preparation for the HSE exam. The Open and Competitive Request for Proposals (RFP) also included ESOL services, however, no applicants requested funds for ESOL. There is also a greater emphasis being placed on career pathway development with the goal of supporting a seamless transition for formerly incarcerated individuals in re-entry to the workforce. Given the maximum sentencing duration of two years in all CHCs. The need to prioritize service to students scheduled for release within five (5) years is only relevant to DOC, however, DOC did not submit a proposal for services during the O&C RFP.

The educational ABE services are currently offered in seven (7) CHCs (state and federal funding). In addition, there are two (2) MassSTEP ABE programs offered in correctional institutions.

Request for Proposals (RFP)

The Massachusetts Department of Elementary and Secondary Education (DESE) administered the Adult Education in Correctional Institutions (AECI) grants, fund codes 285/563, consistent with Public Law 113-128, Section 225 to:

(a) Carry out corrections education and education for other institutionalized individuals using funds provided under section 222 of the Act for the cost of educational programs for criminal offenders in correctional institutions¹ and those living in the community while under parole or probation supervision, including academic programs for:

1. Adult education, literacy activities, and English for Speakers of Other Languages;
2. Special education, as determined by the eligible agency;
3. Secondary school credit;
4. Integrated education and training (MassSTEP — ABE, competed in a separate RFP for MassSTEP services);
5. Career pathways;
6. Concurrent enrollment;
7. Peer tutoring; and
8. Transition to re-entry initiatives and other post-release-services with the goal of reducing recidivism and facilitate:

- (a) Re-entry into society;
 - (b) Further education and training or employment upon release;
 - (c) Economic self-sufficiency; and
 - (d) Smooth transitions in their roles as family members and citizens.
 - (e) Reduce disparity in education by providing, in collaboration with WIOA partners and others, high quality AE programming that provides an inclusive and welcoming environment, rigorous curriculum and instruction, and related services responsive to and supportive of diversity, equity, and inclusion (DEI).
9. Support innovation in the development of AE services to effectively serve eligible individuals most in need of education services through in-person and remote instruction and in coordination and collaboration with WIOA partner services.
10. Improve and accelerate participant outcomes, especially educational functioning level completion, high school equivalency (HSE) credential or high school diploma (ADP) attainment, and enrollment in post-secondary education or training.

Eligible agencies/organizations that have demonstrated effectiveness in providing adult education and literacy services, including agencies that have not previously been funded by DESE, are eligible to apply.

Eligible Agency: An organization that has demonstrated effectiveness in providing adult education and literacy activities that may include:

1. a local educational agency
2. a community-based organization or faith-based organization
3. a volunteer literacy organization
4. an institution of higher education
5. a public or private nonprofit agency, including state agencies
6. a library
7. a public housing authority
8. a nonprofit institution not described in any of subparagraphs (1) through (7) and has the ability to provide literacy activities to eligible providers
9. a consortium or coalition of the agencies, organizations, institutions, libraries, or authorities described in (1) through (8)
10. a partnership between an employer and an entity described in any of the eligible organizations listed

Note: As required by WIOA the applicant must demonstrate past effectiveness by submitting past performance data in serving eligible participants.

Consistent with WIOA Subpart C, 463.24, to be considered eligible for an award, an applicant must demonstrate past effectiveness by providing performance data reflecting student outcomes. The determination considers a program's record of improving the skills of eligible individuals who have low levels of literacy, in the content domains of reading, writing, mathematics, English language acquisition, and other subject areas relevant to the services contained in the State's application for funds. An eligible provider must also provide information regarding its outcomes for participants related to employment, attainment of secondary school diploma or its recognized equivalent, and transition to postsecondary education and training.

There are two ways in which an eligible provider may meet the requirements:

1. An applicant that is a current Adult Education grantee must provide performance data from the state-administered adult education Management Information System (MIS) to demonstrate past effectiveness.
2. An applicant that is not a current Adult Education grantee must provide performance data to demonstrate its past effectiveness in serving basic skills deficient eligible individuals using as defined by the applicant.

In awarding grants for adult education and literacy activities to eligible providers, DESE considered the 13 WIOA Considerations (Sec 231) and the eligible applicants were also reviewed for alignment with local plans by local boards.

Eligible providers awarded AECL grants must:

1. Design, implement, and evaluate adult education services guided by the priorities established in the:
 - 13 WIOA Considerations
 - Massachusetts Policies for Effective Adult Education in Community Adult Learning Centers and Correctional Institutions
 - Massachusetts Indicators of Program Quality
 - *WIOA Massachusetts Combined State Plan*
2. Give priority to individuals who are likely to leave the correctional institution within five years of participation in the program.

B. INTEGRATED ENGLISH LITERACY AND CIVICS EDUCATION PROGRAM (MassSTEP ESOL)

1. Describe how the State will establish and operate Integrated English Literacy and Civics Education programs under *Section 243 of WIOA*, for English language learners who are adults, including professionals with degrees and credentials in their native countries

MassSTEP ESOL provides ESOL instruction concurrently and contextually with civics education in addition to workforce preparation activities and workforce training to accelerate learning outcomes, including student attainment of one or more relevant IRCs. MassSTEP models are

intended to accelerate entry into employment. In PY23-27 sixteen (16) providers were funded to offer MassSTEP services across the Commonwealth.

ACLS plans to offer annual *O&C Requests for Proposals for MassSTEP ESOL planning and implementation grants* to expand current offerings of IELCE programing in the state.

2. Describe how the State will fund, in accordance with the requirements of title II, subtitle C, Integrated English Literacy and Civics Education services and how the funds will be used for those services.

ACLS issued MassSTEP competitive request for proposals (RFP) in 2023 for PY23-27 funding cycle designed for partnerships among education providers, training providers, employers, and workforce partners to implement an instructional program for adult learners in high wage/high demand career pathways. Grants were developed consistent with Public Law 113-128, Sections 201 through 243.

MassSTEP programs were funded in two phases: planning and implementation. Planning grants were optional. Applicants did not need to have first received a planning grant to apply for an implementation grant to offer MassSTEP services.

Funds were used in accordance with the *FY24–FY28 Policies for Effective MassSTEP Programs in Community Adult Learning Centers and Correctional Institutions*: [policies.docx \(live.com\)](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.doe.mass.edu%2Facs%2FMassSTEP%2Fpolicies.docx&wdOrigin=BROWSELINK)
<https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.doe.mass.edu%2Facs%2FMassSTEP%2Fpolicies.docx&wdOrigin=BROWSELINK>

[Adult Education Policies - Adult and Community Learning Services \(ACLS\)](https://doe.mass.edu/acs/abeprogram/default.html)
doe.mass.edu/acs/abeprogram/default.html to provide services to eligible students; eligible students are:

- at least 16 years of age; and
- not enrolled or required to be enrolled in secondary school under state law, and
- English language learners.

Funding must be used to:

- Deliver, manage, and evaluate a multi-year MassSTEP program
- Develop and document contextualized curriculum
- Implement NRS-required assessments
- Collect and input student data into the statewide data management system.

Eligible agencies/organizations that have demonstrated effectiveness in providing adult education and literacy services, including agencies that have not previously been funded by DESE, are eligible to apply.

Eligible Agency: An organization that has demonstrated effectiveness in providing adult education and literacy activities that may include:

1. a local educational agency
2. a community-based organization or faith-based organization
3. a volunteer literacy organization
4. an institution of higher education
5. a public or private nonprofit agency
6. a library
7. a public housing authority
8. a nonprofit institution not described in any of subparagraphs (1) through (7) and has the ability to provide literacy activities to eligible providers
9. a consortium or coalition of the agencies, organizations, institutions, libraries, or authorities described in (1) through (8)
10. a partnership between an employer and an entity described in any of (1) through (9)

Note: As required by WIOA the applicant demonstrated past effectiveness by submitting past performance data in serving eligible participants.

Consistent with *WIOA Subpart C, 463.24*, to be considered eligible for an award, an applicant must demonstrate past effectiveness by providing performance data reflecting student outcomes. The determination considers a program's record of improving the skills of eligible individuals who have low levels of literacy, in the content domains of reading, writing, mathematics, English language acquisition, and other subject areas relevant to the services contained in the State's application for funds. An eligible provider must also provide information regarding its outcomes for participants related to employment, attainment of secondary school diploma or its recognized equivalent, and transition to postsecondary education and training.

There are two ways in which an eligible provider may meet the requirements:

1. An applicant that is a current Adult Education grantee must provide performance data from the state-administered adult education Management Information System (MIS) to demonstrate past effectiveness.
2. An applicant that is not a current Adult Education grantee must provide performance data to demonstrate its past effectiveness in serving basic skills deficient eligible individuals using as defined by the applicant.

In awarding grants or contracts for adult education and literacy activities to eligible providers, DESE must consider the *13 WIOA Considerations (Sec 231)*.

The following priorities have been established for MassSTEP ESOL program proposals that are informed by evidence-based practices.

Priorities are to support applicants that demonstrate:

- a need for MassSTEP ESOL services
- Career pathway development in priority occupations as shown in the [WIOA local plan mass.gov/service-details/wioa-local-plan-packages](https://www.mass.gov/service-details/wioa-local-plan-packages)
- A program design of 16 weeks or less (requirement)
- Partnership with one or more local area employers in the occupation that includes but is not limited to assistance with job placement/employment (requirement)
- Student attainment of one or more IRCs (requirement)
- Collaborations with local MassHire Workforce Boards, MassHire Career Centers, and/or [Career/Vocational Technical Education doe.mass.edu/ccte/cvte/](https://doe.mass.edu/ccte/cvte/) programs.
- Commitment to delivering a program that adheres to the *FY24–FY28 Policies for Effective MassSTEP Programs in Community Adult Learning Centers and Correctional Institutions: policies.docx (live.com)* <https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.doe.mass.edu%2Ffacts%2Fmassstep%2Fpolicies.docx&wdOrigin=BROWSELINK> and [MassSTEP Brand Standards and Implementation Guide](#).

ACLS intends to issue additional opportunities to offer MassSTEP ESOL services by issuing annual O&C RFPs for eligible organizations to apply for MassSTEP funding during the current funding cycle.

3. Describe how the Integrated English Literacy and Civics Education program under section 243(a) of WIOA will be designed to prepare adults who are English language learners for, and place such adults in, unsubsidized employment in in-demand industries and occupations that lead to economic self-sufficiency.

Each AE agency that has IELCE funding has an ACLS PS who provides technical assistance. ACLS supports career pathways (which includes IELCE) professional development through its SABES Program Support PD Center. The center provides workshops, resources, and guidance on IELCE/MassSTEP service delivery, promising models, and identifying on-ramps to high-demand industry sectors, among other topics. ACLS convenes MassSTEP ESOL programs quarterly to discuss policies, outcomes, program challenges and successes and create opportunities for programs to learn from one another and network. ACLS also issues [MassSTEP newsletter doe.mass.edu/acls/MassSTEP/newsletters/](https://doe.mass.edu/acls/MassSTEP/newsletters/) where programs can highlight their MassSTEP services, promising practices, and student achievements.

1. Massachusetts will continue to operate IELCE programs under Section 243 of WIOA for ELLs who are adults, including professionals with degrees and credentials in their native countries.

MassSTEP ESOL programs are committed to delivering services that adhere to the [FY24–FY28 Policies for Effective MassSTEP Programs in Community Adult Learning Centers and Correctional Institutions policies.docx \(live.com\)](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.doe.mass.edu%2Facs%2FMassSTEP%2Fpolicies.docx&wdOrigin=BROWSELINK) <https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.doe.mass.edu%2Facs%2FMassSTEP%2Fpolicies.docx&wdOrigin=BROWSELINK> and [MassSTEP Brand Standards and Implementation Guide](#). Currently MA funds sixteen agencies (16) that offer twenty (20) MassSTEP ESOL programs across the state.

2. In order to receive Massachusetts IELCE funding (MassSTEP ESOL) agencies must describe how they will provide contextualized and concurrent ESOL instruction, workforce preparation activities, and workforce training. Providers must submit to the state a schedule and description of how the instruction will be contextualized and run concurrently. In addition, providers need to partner with an in-demand industry employer that has job openings for positions leading to self-sufficiency. Programs must also end in students earning one or more industry-recognized credentials. ACLS posted MassSTEP ESOL ([IELCE](#)) [abstracts](#) doe.mass.edu/acs/acp/?section=training which provide specific information on each MassSTEP ESOL (IELCE) program and can be found on our [MassSTEP webpage](#). doe.mass.edu/acs/MassSTEP/profiles/

4. Describe how the Integrated English Literacy and Civics Education program under section 243(a) of WIOA will be designed to integrate with the local workforce development system and its functions to carry out the activities of the program.

1. All IELCE programming must be contextualized to high-demand occupations as identified by the local area's MassHire Workforce Board. Providers must establish that they have qualified AE and workforce training instructors. Providers are encouraged to collaborate with local job training, postsecondary, and/or career/vocational technical education programs on the workforce training component. These workforce training providers not only have the technical expertise but are often industry experts themselves who are well-positioned to provide career guidance in addition to instruction. Advising is also a central component of all IELCE programs. Advisors guide students through the program of study and assist with employment assistance by connecting with local employers and career centers.
2. The state encourages programs to seek program guidance from local workforce boards. The state requires applicants to provide evidence from their workforce partners that the industry they have chosen for programming is in-demand and has positions that lead to economic self-sufficiency. Priority funding is given to programs with strong relationships with local career centers, chambers of commerce, and workforce boards.

STATE LEADERSHIP

Describe how the state will use the funds to carry out the required state leadership activities under section **223** of WIOA.

ACLS reserves the right to use funds made available under section 222(a)(2) for the required State leadership activities outlined in section 223 (such as the support of State or regional networks of literacy resource centers; the development and implementation of technology applications; the development and dissemination of curricula, including curricula incorporating the essential components of reading instruction, developing content and models for integrated education and training and career pathways). Not more than 12.5% of the grant funds made available will be used to carry out these adult education and literacy activities to develop or enhance the adult education system of the State. The following activities will be supported through State Leadership funds and state funding:

- **The alignment of adult education and literacy activities with other core programs and one-stop partners**, including eligible providers, to implement the strategy identified in the *Unified State plan* under section 102 or the *Combined State plan* under *Section 103*, including the development of career pathways to provide access to employment and training services for individuals in adult education and literacy activities.
 - **ACLS has a dedicated staff position to the development and support of career pathways** including the development and support for the IET/IELCE models which were branded in Massachusetts as MassSTEP ABE and MassSTEP ESOL.
 - The state office developed a **MassSTEP branding guide** and dedicated webpage that features currently funded MassSTEP providers and offers a detailed description for each program under program profiles. The webpage also includes resources and MassSTEP newsletter that is issued 3 times a year and includes MassSTEP program and student highlights together with featured research and emerging industries.
 - The **state convenes MassSTEP providers** on quarterly bases to offer TA and opportunities to network.
 - ACLS director and a team leader participate in bi-weekly statewide **State Plan advisory committee (SPAC) meetings** which are devoted to coordination of WIOA partner services in MA.
 - **ACLS staff include workforce representative in O&C RFP proposal reviews** as part of the review team that reviews, scores, and recommends proposals for funding.
- **The establishment or operation of high-quality professional development programs to improve the instruction provided pursuant to local activities** required under section 231(b), including instruction incorporating the essential components of reading instruction as such components relate to adults, instruction related to the specific needs of adult learners, instruction provided by volunteers or by personnel of a State or outlying area, and dissemination of information about models and promising practices related to such programs.
 - Using state and federal funds Massachusetts supports a robust adult education professional development (PD) system, known as **SABES**, that provides adult

education staff with high-quality professional development (HQPD). The system consists of five (5) PD centers:

- **A PD System Communication Center** [responsible for the statewide SABES website, calendar, and registration system as well as promoting SABES PD and maximizing adult educator participation in SABES PD. https://sabes.org/pd-center/communication-center](https://sabes.org/pd-center/communication-center)
- **A Program Support PD Center** [focused on such areas as educational leadership, career pathways, ADA resources, digital literacy, advising, and professional licensure. https://sabes.org/pd-center/program-support](https://sabes.org/pd-center/program-support)
- **Mathematics and Adult Numeracy Curriculum and Instruction PD Center**
- **English Language Arts (ELA) Curriculum and Instruction PD Center**
- **English for Speakers of Other Languages (ESOL) Curriculum and Instruction PD Center**

The three (3) Curriculum and Instruction PD Centers provide PD and support in such areas as implementation of the CCRSAE; effective instructional strategies including those with a focus on the essential components of reading; addressing the needs of adults including those with learning disabilities; integration of digital literacy and formative (and other) assessments; contextualized curriculum; integration of diversity, equity, and inclusion (DEI) into PD; and being a reflective practitioner. The [SABES calendar sabes.org/calendar](https://sabes.org/calendar) features all current PD offerings in MA offered through SABES.

- In partnership with UPD Consulting, the ACLS Team has been offering an **Anti-racism, Diversity, Equity, and Inclusion (ADEI)** professional learning series to instructional staff, program team members, and leaders across all adult education organizations and programs starting in February 2022. This five-part series consists of opportunities to explore current manifestations and historical root causes of racial inequities in the adult education system and in the communities in which they are located. The goal of the statewide trainings is to have a greater impact on the students we serve by better understanding their lived experiences and intentionally creating spaces of inclusion and belonging. This PD opportunity is offered to program teams including students, annually.
- ACLS provides an annual multi day **New Directors' Orientation (NDO)** for new program directors and their staff in the beginning of each academic year. ACLS staff presents key policy information to new directors as well as current directors interested in a refresher. Participants benefit from key ACLS staff presentations on topics such as an overview of the ACLS system, key ACLS initiatives, NRS reporting, WIOA legislation, the *ACLS Policy manual*, MA Indicators of Program Quality, curriculum, assessment, and digital literacy instruction. During the sessions program directors also meet with their assigned program specialists to discuss specific program needs.

- An annual **Directors Meeting** is organized by ACLS in May. ACLS staff presents on priority areas, policies, content alignment, promising practices/models, and other important topics.
- **State as Partner** quarterly webinar led by the ACLS adult education state director offers regular opportunities to hear about new policies or projects and priority areas as well as to hear from the field on important adult education matters.
- The state director also started in PY2023 an annual **Date with the State** webinar intended for teachers, advisors, and professional staff to share important information and learn more about professional staff's needs.

The provision of technical assistance to eligible providers of adult education and literacy activities receiving funds under this title, including — (i) the development and dissemination of instructional and programmatic practices based on the most rigorous or scientifically valid research available and appropriate, in reading, writing, speaking, mathematics, English language acquisition programs, distance education, and staff training; (ii) the role of eligible providers as a one-stop partner to provide access to employment, education, and training services; and (iii) assistance in the use of technology, including for staff training, to eligible providers, especially the use of technology to improve system efficiencies.

- a. A combination of state and federal leadership funds supports a team of ACLS Program Specialists who have a caseload of programs, provide technical assistance, conduct annual site visits, conduct regular desk reviews, and participate in program quality review visits to programs in their caseload. Many provide content for monthly ACLS newsletters, provide workshops and/or statewide webinars to support local programs in policy implementation and share available resources on a wide range of topics, such as curriculum, assessment, data collection, career pathways, etc.
- b. In addition to the SABES statewide PD system, ACLS staff uses various venues to distribute research, policy updates, promising practices, and available resources to the field:
 - ACLS [adult education website](https://mass.egrantsmanagement.com/default.aspx)
<https://mass.egrantsmanagement.com/default.aspx>
 - ACLS [Monthly newsletter](https://doe.mass.edu/acsl/mailings/default.html) doe.mass.edu/acsl/mailings/default.html
 - [MassSTEP newsletter](https://doe.mass.edu/acsl/MassSTEP/newsletters/) doe.mass.edu/acsl/MassSTEP/newsletters/
 - Policy guidelines that get updated annually ([adult education policies](https://doe.mass.edu/acsl/abeprogram/default.html))
doe.mass.edu/acsl/abeprogram/default.html
 - Convening specialty meetings for outstationing coordinators, adult ed MA representatives on local workforce boards, corrections coordinators, etc.

In 2023 ACLS commissioned an environmental scan of adult education digital literacy (AEDL) research that will inform future work towards integration of digital literacy and program and

student use of technology (see section “*An Environmental Scan of Adult Education Digital Literacy Research*” under Digital Literacy and Distance Education).

The monitoring and evaluation of the quality of, and the improvement in, adult education and literacy activities and the dissemination of information about models and proven or promising practices within the State.

Program Quality Reviews. ACLS conducts a multi-year evaluation that yielded findings and recommendations that informed the AE open and competitive RFPs and RFRs for PY23-27 funding cycle. Annual summative PQR reports are posted on the [ACLS website](https://doe.mass.edu/acls/accountability/program-quality/reviews.html) doe.mass.edu/acls/accountability/program-quality/reviews.html. These reports yield information about program TA needs and point to topics which ACLS program specialists can address in their ongoing technical assistance with programs.

All adult education programs in MA are required to have continuous improvement plans. Additionally, ACLS has a process to put programs under a corrective action plan which is closely monitored by the ACLS program specialist assigned to that program.

Promising practices and research are shared by ACLS as described in the section above.

Describe how the state will use the funds to carry out permissible state leadership activities under section 223 of WIOA, if applicable.

State leadership funds will be used to carry out permissible state leadership activities under section 223 of WIOA including, but not limited to:

ACLS has a dedicated staff position to help build programs’ capacity to develop a high- quality curriculum and promoting quality instruction. ACLS supports programs by developing the capacity of AE educators. ACLS will continue to develop policies that build teacher capacity and strengthen instruction, inform PD, and support the capacity of staff to implement the CCRSAE so that students gain the academic skills needed to be successful in their next steps.

In July 2020, ACLS participated in the Teaching the Skills That Matter (TSTM) in Adult Education project led by American Institute for Research (AIR) and the Office for Career, Technical and Adult Education (OCTAE). The goal of this project was to train teachers to integrate the skills that matter to adult students using approaches that work across critical topic areas. Using the project's tools and training, adult education teachers can teach the transferable skills students need in these critical contexts. ACLS in collaboration with SABES Curriculum and Instruction Professional Development Centers have been working together on implementing and sustaining the *TSTM plan for FY2022–FY2024*. TSTM FY2024 Academies were launched in September 2023 and provide participants with in-depth training on the TSTM framework.

- ACLS provides TA and PD to workplace education programs.

- ACLS provides guidance and supports adult career pathway development in Massachusetts across 16 LWDB in strengthening their ability to prepare students for careers in regionally identified industries (e.g., health care, early childhood education, hospitality/customer service, and advanced manufacturing). For example, ACLS facilitates quarterly MassSTEP (IET/IELCE) meetings for programs to solicit feedback and guidance, share promising practices and models for integrated education and training and integrated English literacy and civics education, provide networking opportunities, and plan for an expanded partnership collaboration.
- State-level guidance, policy, and TA regarding required [assessments](#).
doe.mass.edu/acls/assessment/default.html
- ACLS provides regular state-level guidance and TA in understanding WIOA measures and meeting the state adjusted levels of performance described in *section 116(b)(3)*.
- ACLS will provide other activities of statewide significance as needed to assist programs and promote the purpose of the adult education and family literacy programs.
- ACLS convenes an [Adult Education \(AE\) Advisory Council](#)
doe.mass.edu/bese/councils/abe.html that advises the Commissioner of Elementary and Secondary Education on matters pertinent to the development of AE in the Commonwealth. The Council consists of state partners, AE local program staff, and students and meets quarterly. The Council advises on the implementation of the New Educational Vision for the Department of Elementary and Secondary Education (DESE) and ACLS goals for the adult education field.

ASSESSING QUALITY

ACLS revised the *Indicators of Program Quality (IPQ)* to sharpen the field's focus on issues of diversity, equity, and inclusion, and the need to consider more flexible modes of service delivery (in-person, hybrid, remote). The revised IPQs were used to inform the development of the open and competitive RFPs in 2022/23. Two of the more notable changes in the new IPQs include:

1. Adding a new standard to *Indicator 1 – Program Design*, which reads, “The program is designed to deliver services in a variety of modalities (e.g., in person, virtual face-to-face, remote) with options for synchronous and asynchronous instruction, including co-enrollment).”
2. Adding a new standard to *Indicator 2 – Equitable Access*, which reads, “The program intentionally seeks to remedy disparities in students’ educational experiences and outcomes by analyzing quantitative and qualitative data through a diversity, equity, and inclusion lens.”
3. ACLS annually releases a *PQR Summative Report*. Based on the report findings from the last funding cycle, ACLS revised its PQR process for PY23-27 to narrow its focus to the review of just one indicator (i.e., *Indicator 9 – Educational Leadership*) instead of four. The goal is to maximize impact by providing more attention and TA in this essential area.

4. ACLS also revised its SV protocol for program specialists to bring greater emphasis to two key principles: (1) narrow the focus to increase the impact, (2) approach each visit with an inquiry-based mindset grounded in humility and mutual respect.
5. In addition to student outcomes, program quality, and compliance, ACLS added a fourth component to its accountability system: enrollment. Each program has an average monthly enrollment target that is weighted according to the type of service the program provides: ABE, ESOL, or both. Programs in good standing that meet or exceed their target(s) are eligible to receive increased funding if/when funds become available. Programs that do not meet their target(s) may have their base funding decreased.
6. ACLS has several processes in place to ensure programs comply with federal and state requirements and deliver high quality services that result in student outcomes. These processes, or tools of accountability, will continue to be refined and include:
 1. Grant approval process
 2. Desk Reviews
 3. *Data Quality Checklist*
 4. Risk Analysis
 5. MSG Reports
 6. Site Visits

Adult Education and Family Literacy Act Program Certifications

The <i>State Plan</i> must include:	Included?
1. The plan is submitted by the State agency that is eligible to submit the plan;	Yes
2. The State agency has authority under State law to perform the functions of the State under the program;	Yes
3. The State legally may carry out each provision of the plan;	Yes
4. All provisions of the plan are consistent with State law;	Yes
5. A State officer, specified by title in the certification, has authority under State law to receive, hold, and disburse Federal funds made	Yes
6. The State officer who is submitting the plan, specified by the title in the certification, has authority to submit the plan;	Yes
7. The agency that is submitting the plan has adopted or otherwise formally approved the plan; and	Yes
8. The plan is the basis for State operation and administration of the program;	Yes

Adult Education and Family Literacy Act Program Assurances

Massachusetts' state plan continues to include required assurances.

The State Plan must include:	Included?

1. The eligible agency will expend funds appropriated to carry out title II of the Workforce Innovation and Opportunity Act (WIOA) only in a manner consistent with fiscal requirements under <i>section 241(a) of WIOA</i> (regarding the supplement-not-supplant requirement);	Yes
2. The eligible agency will ensure that there is at least one eligible provider serving each local area, as defined in <i>section 3(32) of WIOA</i> ;	Yes
3. The eligible agency will not use any funds made available under title II of WIOA for the purpose of supporting or providing programs, services, or activities for individuals who are not “eligible individuals” within the meaning of <i>section 203(4) of WIOA</i> , unless it is providing programs, services or activities related to family literacy activities, as defined in <i>section 203(9) of WIOA</i> ;	Yes
4. Using funds made available under title II of WIOA to carry out a program for criminal offenders within a correctional institution, the eligible agency will give priority to serving individuals who are likely to leave the correctional institution within five years of participation in the program.	Yes
5. The eligible agency agrees that in expending funds made available under Title II of WIOA, the eligible agency will comply with <i>sections 8301 through 8303 of the Buy American Act (41 U.S.C. 8301-8303)</i> .	Yes

Authorizing or Certifying Representative

Applicant's Organization	Enter information in this column
Applicant's Organization	Department of Elementary and Secondary Education
Printed Name and Title of Authorized Representative	Enter information in this column
First Name	Wyvonne
Last Name	Stevens-Carter
Title	Adult Education State Director
Email	Wyvonne.stevens-carter@mass.gov

SECTION 427 OF THE GENERAL EDUCATION PROVISIONS ACT (GEPA)

DESE plays a pivotal role in ensuring access to high-quality education for all students in the Commonwealth. To support the goal of providing greater access and opportunities for students, DESE staff members are committed to developing and strengthening the knowledge, capacity, and skills necessary to understand and address how policies and practices can support more equitable student outcomes. Further, leadership within DESE is committed to cultivating the skills to foster a climate of trust throughout the agency that is built on diversity, equity, and inclusion. These efforts are spread across all centers and teams at DESE.

DESE is an equal opportunity employer where the following language is posted on all job descriptions:

An Equal Opportunity/Affirmative Action Employer. Females, minorities, Veterans, and persons with disabilities are strongly encouraged to apply. The Commonwealth is an Equal Opportunity Employer and does not discriminate on the basis of race, religion, color, sex, gender identity or expression, sexual orientation, age, disability, national origin, Veteran status, or any other basis covered by appropriate law. Research suggests that qualified women, Black, Indigenous, and Persons of Color (BIPOC) may self-select out of opportunities if they don't meet 100% of the job requirements. We encourage individuals who believe they have the skills necessary to thrive to apply for this role.

ACLS is responsible for providing AE services to adults with academic skill levels below grade 12, and/or adults who need English language skills to succeed in our communities. Our commitment to the educational and workforce success of adult students requires that we promote and support diversity[1], equity[2], and inclusion[3] (DEI) on multiple levels. First and foremost, we must guide and support students as they work to improve their skills in a world that does not always see them as assets and often raises barriers to the achievement of their goals and aspirations.

ACLS coordinates and partners with stakeholders to identify, design, pilot, and elevate strategies that advance educational equity for adult learners, particularly those who are traditionally or currently underserved. ACLS address GEPA at a statewide level through the following examples: 1) professional development i.e., Anti-racism, diversity, equity, and inclusion training (20 hours), developing culturally responsive curriculum 2) hiring practices and recruitment of diverse staff and, 3) policy and practices review through a DEI lens.

ACLS ensures that all trainings, print materials and web materials are accessible to individuals with visual and hearing disabilities. State staff, program leaders and students are periodically surveyed to identify gaps that may create barriers to participation and access to services.

1. Diversity: The representation of people from a wide range of races, languages, abilities, identities, experiences, values, and perspectives. And we recognize the impact of intersectionality.
2. Equity: Placing a heightened focus on groups experiencing disproportionate impact through the development of systems to remediate disparities in their experiences and outcomes, particularly racial groups.
3. Inclusion: Pursuing deliberate actions to create welcoming environments and ensure differences are actively sought and heard, and that every individual feels a sense of belonging and a role in impacting decision-making, practices, and policies.

To meet the requirements of [Section 427 of the General Education Provisions Act](https://www2.ed.gov/fund/grant/apply/appforms/gepa427.pdf), <https://www2.ed.gov/fund/grant/apply/appforms/gepa427.pdf> all grantees must complete and submit a GEPA statement in order to receive funding. GEPA requires that all providers funded by the U.S. Department of Education, or Massachusetts Department of Elementary and Secondary Education stipulate how they will ensure equitable participation in their programs. It is meant to be a description of the efforts the provider will make to ensure that barriers to participation by students, teachers, and others will be removed to allow participation.

Six statutory barriers are listed: gender, race, national origin, color, disability, or age. Based on local circumstances, programs determine whether these or other barriers may prevent students, teachers, or others from such access or participation in the adult education program. ACLS requires programs submit their GEPA statements during the annual refunding process. New grant applicants that apply for Title II Adult Education and Family Literacy Act (AEFLA) funding under the Workforce Innovation and Opportunity Act (WIOA) are required to address GEPA section 427 during the competitive *Request for Funding Proposal (RFP)* application process scheduled for 2023. The entire document will continue to be embedded in the RFP application to be completed by each applicant.

ADULT EDUCATION AND LITERACY PROGRAM PERFORMANCE INDICATORS

Performance Indicators	PY 2022 Expected Level	PY 2022 Negotiated Level	PY 2023 Expected Level	PY 2023 Negotiated Level
Employment (Second Quarter After Exit)	43.5%	43.5%	44.0%	44.0%
Employment (Fourth Quarter After Exit)	44.5%	45.5%	45.0%	45.5%
Median Earnings (Second Quarter After Exit)	\$6,900	\$6,900	\$7,000	\$7000
Credential Attainment Rate	28.5%	28.5%	29.0%	29.0%
Measurable Skill Gains	47.0%	47.0%	47.5%	47.5%
Effectiveness in Serving Employers	Not Applicable 1	Not Applicable 1	Not Applicable 1	Not Applicable 1

“Effectiveness in Serving Employers” is still being developed and this data will not be entered in the 2022 *State Plan* modifications.

Performance Indicators	PY 2024 Expected Level	PY 2024 Negotiated Level	PY 2025 Expected Level	PY 2025 Negotiated Level
Employment (2d Quarter After Exit)	44.0%	44.0%	44.5%	44.5%
Employment (4th Quarter After Exit)	46.0%	48.3%	46.5%	48.5%

Median Earnings (2d Quarter After Exit)	\$7,500	\$7,920	\$7,800	\$7,925
Credential Attainment Rate	29.0%	29.0%	29.0%	29.5%
Measurable Skill Gains	47.5%	47.5%	47.5%	47.8%
Effectiveness in Serving Employers	Not Applicable 1	Not Applicable 1	Not Applicable 1	Not Applicable 1

VOCATIONAL REHABILITATION

Program-Specific Requirements for State Vocational Rehabilitation Services Program (General)

TWO YEAR UPDATE

The Massachusetts State Rehabilitation Council (SRC) was established pursuant to [29 U.S. Code § 725](#) and [34 CFR 361.17](#). The federal law mandates that the SRC be comprised of at least 15 members and meet specific membership requirements, and that at least a majority of its members are individuals with disabilities. Massachusetts reaffirmed the significant roles individuals with disabilities play in the policy development of the state's vocational rehabilitation services. Governor Healey signed Executive Order No. 635 reconstituting MassAbility's State Rehabilitation Council mirroring the federal requirements and in compliance with RSA's Technical Assistance Circular RSA-TAC-23-02: *Federal Requirements Governing the Composition and Membership of, and Appointments to, the State Rehabilitation Councils*.

MassAbility's SRC membership has made significant headway in the last two years working with its Secretariat, the Executive Office of Health and Human Services, and the Governor's Office to ensure that the SRC is properly supported.

MassAbility has an ongoing process with the SRC to obtain input on a continuous basis. MassAbility representatives attend SRC Quarterly Council meetings, monthly SRC Executive Committee meetings, and quarterly SRC Committee meetings to obtain input and to provide updates to the SRC. Ad-Hoc meetings can also be scheduled as needed. As part of these, the SRC provides input and suggestions to MassAbility regarding agency key priorities for Vocational Rehabilitation, MassAbility projects, reviews the results of Participant Satisfaction from the *MassAbility Service Experience Survey*, and jointly participates in the *Comprehensive Statewide Needs Assessment* process.

The SRC State Plan Subcommittee met with MassAbility on an ongoing basis and provided input to the PY2024-PY2027 Vocational Rehabilitation Section of the State Plan as well as the 2-year modification for PY2026-PY2027. The SRC also was jointly involved in the development of the State Plan goals and also reviewed the entire draft of the State Plan to provide input and suggestions. Edits received by the SRC were incorporated into the final state plan. Edits included content of goals and strategies, including those related to the Participant Experience Survey, and increasing employment of MassAbility participants in high-wage occupational areas, among others. MassAbility continues to collaborate with WIOA partners, working towards outcome-driven employment metrics. The 2025-2026 Needs Assessment utilized data from the MassAbility Participant Experience Survey, Staff Experience Survey, Needs Assessment Participant Survey, Provider Experience Survey, and data analysis of MassAbility, local, state, and federal data to develop conclusions and recommendations. MassAbility continues to support implementation of the State Plan.

The Vocational Rehabilitation (VR) Services Portion of the *Unified or Combined State Plan* must include the following descriptions and estimates, as required by sections 101(a) and 606 of the Rehabilitation Act of 1973, as amended by title IV of WIOA.

(a) State Rehabilitation Council. All VR agencies, except for those that have an independent consumer-controlled commission, must have a State Rehabilitation Council (Council or SRC) that meets the criteria in section 105 of the Rehabilitation Act. The designated State agency or designated State unit, as applicable, has (select A or B):

(A) is an independent State commission.

(B) Has established a State Rehabilitation Council.

B – MRC has established a State Rehabilitation Council (SRC)

In accordance with Assurance 3(b), please provide information on the current composition of the Council by representative type, including the term number of the representative, as applicable, and any vacancies, as well as the beginning dates of each representative's term.

Council Representative	Current Term Number/Vacant	Beginning Date of Term Month/Year
Statewide Independent Living Council (SILC)	Vacant	
Parent Training and Information Center	1	7/2021
Client Assistance Program	1	
Qualified Vocational Rehabilitation (VR) Counselor (Ex Officio if Employed by the VR Agency)	Vacant	
Community Rehabilitation Program Service Provider	1	1/2021
Business, Industry, and Labor	2	10/2018
Business, Industry, and Labor	Vacant	
Business, Industry, and Labor	Vacant	
Business, Industry, and Labor	1	9/2021

Disability Advocacy Groups	Vacant	
Current or Former Applicants for, or Recipients of, VR services	1	10/2021
Section 121 Project Directors in the State (as applicable)	N/A	
State Educational Agency Responsible for Students with Disabilities Eligible to Receive Services under Part B of the Individuals with Disabilities Education Act (IDEA)	Vacant	
State Workforce Development Board	Vacant	
VR Agency Director (Ex Officio)	1	7/2017

If the SRC is not meeting the composition requirements in *section 105(b)* of the Rehabilitation Act and/or is not meeting quarterly as required in *section 105(f)* of the Rehabilitation Act, provide the steps that the VR agency is taking to ensure it meets those requirements.

The Massachusetts State Rehabilitation Council (SRC) was established pursuant to [29 U.S. Code § 725 law.cornell.edu/uscode/text/29/725](#) and [34 CFR 361.17. ecfr.gov/current/title-34/subtitle-B/chapter-III/part-361/subpart-B/subject-group-ECFR598a81fff49e46d/section-361.17](#) The federal law mandates that the SRC be comprised of at least 15 members and meet specific membership requirements, and that at least a majority of its members are individuals with disabilities. Massachusetts, through [Executive Order 368, mass.gov/executive-orders/no-368-establishing-a-rehabilitation-advisory-council](#) increased the number of members to at least 21.

MRC recognizes that its SRC membership is not currently constituted in accordance with Federal requirements as evidenced by RSA's *Technical Assistance Circular RSA-TAC-23-02* <https://rsa.ed.gov/sites/default/files/subregulatory/RSA-TAC-23-02.pdf>: *Federal Requirements Governing the Composition and Membership of, and Appointments to, the State Rehabilitation Councils*. MRC is currently working with its Secretariat, the Executive Office of Health and Human Services, and the Governor's Office to bring the SRC in compliance with federal law.

In accordance with the requirements in *section 101(a)(21)(A)(ii)(III) of the Rehabilitation Act*, include a summary of the Council's input (including how it was obtained) into the *State Plan* and any *State Plan* revisions, including recommendations from the *Council's Annual Reports*, the review and analysis of consumer satisfaction and other Council reports.

Recommendation FY24-1: Recommend MRC reach out to the sheriff's department at the Worcester County Jail and House of Correction to explore outreach to individuals with disabilities using a dog training program and to get inmates' input on the program.

Responsible SRC Committee: Customer Satisfaction/Needs Assessment Committee

Recommendation FY24-2: Recommend MRC analyze for accessibility the current ways people with disabilities give input and results from service experience needs survey.

Responsible SRC Committee: Customer Satisfaction/Needs Assessment Committee

Recommendation FY24-3: Recommend MRC Councilors identify if a consumer is financially struggling and educate the consumer about possible resources and barriers to access these resources.

Responsible SRC Committee: Customer Satisfaction/Needs Assessment Committee

Recommendation FY24-4: MRC will work with the SRC to develop practical strategies for sharing work incentives information with the business community/employers.

Responsible SRC Committee: Business and Employment Opportunity Committee

Recommendation FY24-5: MRC will work with the Business and Employment Opportunity Committee of the SRC to analyze results of MRC Consumer, Employer, and Provider survey data to better align SRC Recommendations to relevant findings.

Responsible SRC Committee: Business and Employment Opportunity Committee

Recommendation FY24-6: Develop a Request for Response (RFR) to get three additional business consultants to advise consumers pursuing self-employment to achieve their vocational goal.

Responsible SRC Committee: Business and Employment Opportunity Committee

Recommendation FY24-7: MRC will collaborate with SRC to identify, recruit, and engage more MRC Consumers and stakeholders from specific backgrounds, groups, and organizations required by federal regulations, including Un-served/Under-served communities, individuals with disabilities, and businesses.

Provide the VR agency's response to the Council's input and recommendations, including an explanation for the rejection of any input and recommendations.

Recommendation FY24-1: Recommend MRC reach out to the sheriff's department at the Worcester County Jail and House of Correction to explore outreach to individuals with disabilities using a dog training program and to get inmates' input on the program.

Responsible SRC Committee: Customer Satisfaction/Needs Assessment Committee

MRC Response to FY24-1

MRC recognizes the importance of engagement with correctional populations, as well as the importance of service animals for many individuals living with disabilities. MRC offices have ongoing outreach to several correctional facilities (e.g., Middleton, Suffolk), and in FY24 we will

continue these efforts. MRC's focus regarding developing and delivering training programs is directed towards career pathways targeted for high growth and sustainability, for example cybersecurity, Pharmacy Technician, Human Services, and more. As such, this recommendation is not in line with the agency's current strategic priorities. MRC proposes to:

- Not accept this recommendation.

Recommendation FY24-2: Recommend MRC analyze for accessibility the current ways people with disabilities give input and results from service experience needs survey.

Responsible SRC Committee: Customer Satisfaction/Needs Assessment Committee

In FY23, in partnership with the Service Recipient (consumer) Satisfaction/Needs Assessment Committee, MRC launched the development and implementation of a new services experience survey for current and former Job Seekers engaged with vocational rehabilitation services. Accessibility of the survey was a high priority for the team. Specifically, the survey is multi-modal (e.g., via email, phone), and is available in multiple languages including Spanish, Haitian Creole, Khmer, Portuguese, and Chinese, as well as American Sign Language. The electronic survey has been remediated for accessibility with screen readers (e.g., JAWS) and tested against plain language principles. Our process of survey development, implementation, and engagement in findings is participatory, and includes active partnership of individuals living with disabilities both being served by MRC, individuals from underrepresented populations, as well as individuals with disabilities employed by the agency. The survey was reviewed by the MRC Diversity, Equity, Inclusion and Accessibility Council, and all MRC Employee Resource Groups (e.g., LGBTQ+Allies, Bilingual Group, Black Managers Committee), and Disability Inclusion Leaders and Family Inclusion Ambassadors, to maximize accessibility and cultural responsiveness. In FY24 we plan to continue to engage the Executive Committee, the Service Recipient Satisfaction/Needs Assessment Committee, and the full SRC with survey findings, to discuss and develop strategies regarding data interpretation and dissemination efforts. Initial data from this survey have only recently been received by the agency. MRC is committed to engaging the SRC in the review and interpretation of findings as this is reflective of our values regarding participatory processes. MRC proposes to:

- Combine recommendations FY24-2 and FY24-5.
- Change recommendation language to state, "SRC will continue to actively partner with the MRC in the interpretation of survey data and strategies for developing different channels for collecting feedback and disseminating of findings and associated actions taken."
- Recommend focus include Jobseekers, Employer Partners, and contracted Providers surveys.
- Have the Service Recipient Satisfaction/Needs Assessment Committee and Business and Employment Opportunity Committee jointly hold this recommendation.
- Accept this recommendation (once combined).

Recommendation FY24-3: Recommend MRC Councilors identify if a consumer is financially struggling and educate the consumer about possible resources and barriers to access these resources.

Responsible SRC Committee: Customer Satisfaction/Needs Assessment Committee

Part of the counseling and guidance process with MRC Job Seekers includes identifying individual financial circumstances and, when needed, identifying possible resources and barriers to access these resources. MRC contracts with Independent Living Centers across the Commonwealth to provide financial literacy services as an extension of the VR IL contract. In addition, MRC Benefits Specialists are available in key geographic areas to support individuals. VR staff regularly facilitate warm hand-offs to ensure Job Seekers have awareness of and access to fiscal supports. The statewide MRC Connect eligibility unit, the front door to all vocational rehabilitation services, actively provides informational and referral support as Job Seekers begin their relationships with MRC. Additionally, the MRC Ombudsman provides hands on support to individuals who identify a higher need of financial resources beyond the scope of their services. Understanding and delivering resources specific to individuals' economic sustainability is part of our ongoing work and mission within vocational rehabilitation and is regularly implemented in a variety of ways. MRC proposes to:

- Not accept this recommendation.

Recommendation FY24-4: MRC will work with the SRC to develop practical strategies for sharing work incentives information with the business community/employers.

Responsible SRC Committee: Business and Employment Opportunity Committee

Recognizing the need for improving and expanding inclusive access to economic opportunity, the Commonwealth of Massachusetts launched the Disability Employment Tax Credit (DETC) in October 2022. The DETC is a tax incentive program for employers, developed and implemented by MRC, aimed at increasing employment opportunities for individuals with a disability in the Commonwealth. MRC is currently developing a strategy that includes partnering with a marketing agency to launch a targeted campaign to raise awareness and increase applications for certification. The project will utilize a robust mix of paid, earned, and owned media. MRC would value the engagement of the Business and Employment Opportunity Committee in a participatory and feedback capacity. MRC proposes to:

- Ensure the Business and Employment Committee is integrated into the DETC workplan in the coming year, with a specific focus on supporting opportunities for membership engagement and feedback.
- Ensure the Director of Financial Wellness provides Business and Employment Opportunity Committee members regular updates re: the DETC and supports engagement and feedback.

- Change recommendation language to state, “The SRC will work with the MRC to develop a mechanism and timeline for engagement of Business and Employment Opportunity Committee members during the implementation of the Disability Employment Tax Credit marketing campaign.”
- Accept this recommendation.

Recommendation FY24-5: MRC will work with the Business and Employment Opportunity Committee of the SRC to analyze results of MRC Consumer, Employer, and Provider survey data to better align SRC Recommendations to relevant findings.

Responsible SRC Committee: Business and Employment Opportunity Committee

MRC has procured a vendor to develop and implement an innovation data collection platform to assess experience and engagement with MRC services, including MRC Job Seekers, Employer Partners, and contracted Providers. MRC agrees that findings from these surveys could and should support SRC recommendation alignment; we are excited to partner around this work. MRC proposes to:

- Combine recommendations FY24-2 and FY24-5.
- Change recommendation language to state, “SRC will actively partner with the MRC in the interpretation of survey data and strategies regarding dissemination.”
- Recommend focus include Jobseekers, Employer Partners, and contracted Providers surveys.
- Have the Service Recipient Satisfaction/Needs Assessment Committee and Business and Employment Opportunity Committee jointly hold this recommendation.
- Accept this recommendation (once combined).

Recommendation FY24-6: Develop a *Request for Response (RFR)* to get three additional business consultants to advise consumers pursuing self-employment to achieve their vocational goal.

Responsible SRC Committee: Business and Employment Opportunity Committee

MRC continues to recognize that interest in self-employment has increased over the last number of years, and these opportunities are an important part of the MRC portfolio available to Job Seekers. MRC has existing strategies (e.g., the *Tutor RFR*) for Job Seekers providing consultative support of self-employment vocational goals. MRC welcomes the expertise of Business and Employment Opportunity Committee members to help further explore if current mechanisms are (or are not) meeting existing needs, if there is a gap in supports, and how best address gaps (i.e., is an RFR and/or additional business consultants the right strategy for the identified need, or should other strategies be considered/implemented?). There is a possibility that re-allotment funds could be secured to procure a vendor to assess and enhance current

strategies and mechanisms to support Job Seekers in pursuing self-employment goals. MRC proposes to:

- Change recommendation language to state, “The SRC will work with the MRC to assess and potentially enhance current strategies and mechanisms to support Job Seekers in pursuing self-employment vocational goals.”
- Accept this recommendation.

Recommendation FY24-7: MRC will collaborate with SRC to identify, recruit, and engage more MRC Consumers and stakeholders from specific backgrounds, groups, and organizations required by federal regulations, including Un-served/Under-served communities, individuals with disabilities, and businesses.

Responsible SRC Committee: Executive Committee

MRC is committed to supporting the SRC to ensure there is diversity among Jobseekers and other MRC stakeholders as SRC members from specific backgrounds, groups, and organizations, including Un-served/Under-served communities, individuals with disabilities, and businesses. MRC proposes to:

- Change recommendation language to state, “The SRC will collaborate with the MRC to identify, recruit, and engage more MRC Job Seekers and other stakeholders for SRC membership from specific backgrounds, groups, and organizations required by federal regulations, including Un-served/Under-served communities, individuals with disabilities, and businesses.”
- Accept this recommendation.

(b) *Comprehensive Statewide Needs Assessment (CSNA)*. Section 101(a)(15), (17), and (23) of the Rehabilitation Act require VR agencies to provide an assessment of:

- The VR services needs of individuals with disabilities residing within the State, including:
- Individuals with the most significant disabilities and their need for Supported Employment;

MRC conducted its most recent *Comprehensive Statewide Needs Assessments* in 2021 and 2023. The most recently-published *MRC Comprehensive Statewide Needs Assessment (CSNA) report* can be found on MRC’s website. mass.gov/doc/2021-comprehensive-statewide-needs-assessment/

The 2023 version of this report is being published. The *2023 Needs Assessment* utilized data from the *MRC Consumer Experience Survey*, *Staff Experience Survey*, *Needs Assessment Consumer Survey*, and *data analysis of MRC*, local, state, and federal data to develop conclusions and recommendations.

MRC's 2023 Comprehensive Needs Assessment can be summarized as follows:

1. The *2023 Comprehensive Statewide Needs Assessment* again confirmed that the MRC consumer population is diverse, and that a majority of individuals being served possess the most significant disabilities. Many of these individuals require multiple Vocational Rehabilitation (VR) services and supports to prepare for, search for, obtain, and maintain competitive employment in the community. There are still a significant number of consumers who report transportation as a barrier to employment. There are still a significant number of consumers who report transportation as a barrier to employment. The need for multiple VR services was found to be slightly greater amongst individuals of diverse ethnic and racial backgrounds (particularly African Americans and Hispanics) and for individuals with cognitive or psychological disabilities. The findings suggest that many consumers also require supported employment and ongoing and extended employment supports.
2. Through the *MRC Service Experience Survey*, the majority of MRC consumers believe MRC services are addressing all or most of their needs and are satisfied with MRC services and their experience with MRC. 80% of consumers report being satisfied with the effectiveness of MRCs' Program or Services which continued to reverse a declining trend for this question's response pattern. 75% of MRC consumers believe that services have met their expectations. 64% of consumers say that MRC services have met or exceeded expectations. The majority of VR consumers also remain satisfied with services delivered by MRC VR in the MRC Consumer Satisfaction Survey. Satisfaction with the VR service effectiveness is seen being higher in consumers who are further in the process, with those participating in job search and placement reporting the highest levels of satisfaction.
3. Many consumers provided open comment on the positive impact MRC VR services have, including positive experience with VR staff. Responses outlined helpful and caring staff who are knowledgeable about the area in which they work, who have strong community and employer connections, who work with consumers individually to accommodate each individual's unique needs. Responses also indicated most consumers who are able to reach MRC with no issues, and that MRC staff understand their needs and allow them to provide input. Comments also indicated that services related to education and training are incredibly helpful in allowing individuals to obtain the education and skills that they need to progress in their career. A number of consumers report difficulties with communication with their counselor/caseworker. This has been observed in previous *MRC Needs Assessment and Satisfaction and Experience surveys*. Others feel they have not been provided consistent or adequate information on services or are struggling with the impact of COVID-19, health issues, financial issues, and other difficulties. Others reported difficulties related to staff turnover and having changes in their counselor as a result of staff changes.

4. A total of 81% of consumers are satisfied with the Vocational Goals/IPE set up with their counselor. This is comparable to what has been noted in previous surveys. Consumers expressed high praise for MRC staff and their effectiveness in the development of each IPE. Consumers reported that staff were knowledgeable and helpful, guiding consumers through the process. These comments described an individualized process that established unique goals according to each person's needs. More consumers expressed their satisfaction and positive experiences with staff than any other subject. However, several consumers also commented on a lack of establishing job goals as an issue and may need better guidance and advice in these areas. Not enough follow up from MRC staff was noted as a difficulty by some responding consumers.
5. 82.0% of consumers reported being satisfied with their level of input over the services they received and their involvement in making decisions to choose what is right for them. Furthermore, 84.0% of VR recipients have increasingly expressed the need for additional services to live comfortably and participate in the community. Historically, MRC has found satisfaction with the development of an individual's IPE was found to be strongly associated with a consumer's view on the effectiveness of VR service effectiveness.
6. Some consumers reported needing services that are already provided by MRC as services that they think MRC should provide and would assist them in their vocational goals. This follows trends and patterns observed in previous years and suggests that consumers could require more information on the range of services available to them.
7. All VR service areas were found to be important to a significant portion of MRC consumers. These services had the highest rates of respondents, rating them as Very Important. Assistance Finding a Job/Job Placement continues to be recognized as the most important VR service category (68%), followed by Supported Employment Services to assist you in choosing, obtaining, and maintaining your employment (59.5%), Learning about public benefits and work incentives (e.g., SSI,SSDI)/Benefits Planning (58.8%), Career Counseling and Assessment (55.8%), Work-readiness training and soft skills training (52.5%), Vocational training, certificate program, or technical school (52.1%), Services to assist you in keeping your job (ongoing and extended supports) such as Job Coaching (50.5%), and On-The-Job Training and Employer-Run Trainings (for consumers) (45.7%).
8. The most common occupational areas of interest listed by MRC consumers included Community/Social/Human Services (26%), Health Care (22%), Self-Employment (20%) Administrative (19%), Arts and Entertainment (18%), Computers/Information Technology (18%), Customer Service (16%) and Education/Childcare (12). All but Self-Employment are amongst the top 10 occupational goals by Standard Occupational Code (SOC) in consumer employment plans in the MRCIS Case Management System.

9. Awareness of Independent Living Centers (ILC) decreased among consumers for the first year since 2021. This continues to reverse a negative trend observed over three years of Needs Assessment analysis. 28.9% of consumers report being aware of their local ILC.
10. Transportation continues to be an area of need for some MRC consumers. Reported transportation use by consumers continues to shift under patterns observed in prior Needs Assessments. The effect of the pandemic was previously found to have a profound effect on consumer's reported transportation use and needs. Levels of public transportation and Uber/Lyft/Ride Share use increased from the previous year. Respondents view as transportation as a barrier to finding work increased, with pandemic-related restrictions not as prevalent as years past. 42.8% of respondents to the 2023 survey reported that they view transportation as a barrier to employment. This represents about a 10% increase from 2021. As with previous surveys, cost is observed to be a differentiating factor in whether transportation poses a barrier to an individual obtaining employment. Issues with reliability of public transportation and the lack of public transportation options in regions of the state and to access particular job site are also a challenge for consumers. Open-ended responses once again show that many respondents need to obtain their driver's license as well as a vehicle. Many individuals point to the high cost of transportation/cost of maintaining a vehicle as their main deterrence from primarily relying on those forms of transportation.
11. Finding affordable and accessible housing continues to remain a challenge for many consumers due to the high cost of living in Massachusetts. The Independent Living Centers may be able to assist consumers in this area, and counselors may be able to refer consumers to other resources to assist with housing needs.
12. Some consumers feel they require additional services and supports. These services include job search assistance, job placement and job training, financial assistance, transportation, affordable and accessible housing, counseling and guidance, information on available services, assistive technology, education and training, services from IL centers, and services and supports from other agencies, and computer/technology skills training and/or equipment.
13. The most important single service consumers are receiving includes job placement and job search services, assistance with college education and job training, tuition waivers, vocational counseling and guidance, assistive technology, job readiness training, assistance with obtaining supplies for school and work, ongoing employment supports, job trainings, and transportation.
14. According to the 2023 MRC Staff Experience survey, Two-thirds (61%) of MRC staff are very satisfied or satisfied with their opportunities to provide input with decision making to support service recipients. Overall, three-fifths (62%) of staff agree that they are

informed about resources available to service recipients through MRC. Nearly three-quarters (71%) of staff agree they have the freedom and tools to adapt services to the recipients' preference for remote or in-person services. Almost half (47%) of staff agree service recipients get to choose how the services they receive are delivered, while 8% disagree, and 25% are neutral. This satisfaction rate is once down slightly from the last report in areas where we can compare with the prior survey in this area. Most consumers appear to be satisfied with services received from Community Rehabilitation Providers (CRPs). Most MRC staff also are somewhat or very satisfied with CRP services.

15. There are areas where additional MRC staff training may assist in improving the quality and effectiveness of VR services delivered to consumers. Specific areas include trainings on MRC's case management and data systems, as well as on VR best practices, policies, and procedures, strategies for maintaining communication with consumers and time management, internal controls, WIOA common measures and requirements, trainings on autism, substance abuse, mental health, and on pre-employment transition services and transition services under WIOA, and remote learning and service transition strategies. The MRC Learning and Community Engagement Department within MRC is directing ongoing staff training efforts, utilizing best practices and data driven decision making to make training related decisions and a new RFR has been issued to develop a new comprehensive VR staff training program.
16. The majority of service recipients (76%) agree they have become more financially independent as a result of the services they received from the MRC. VR service recipients were more likely to agree they are more financially independent. Consumers mention that they need financial help and have financial hardships, as well as needing additional help with their plan or goals.
17. 85% of consumers say that MRC responded to their needs in a timely manner. This is up 2% from Q4 2022. A quarter (25%) of service recipients say they are dissatisfied due to their counselor not returning calls, emails, or following up, while 21% say staff did not return calls, emails or follow up.
18. Two-thirds (64%) of VR service recipients prefer to meet virtually (over the phone or through a meeting software) (over the phone or through a meeting software). This suggests MRC should continue to offer both in person and remote/hybrid services to meet the needs and preferences of its consumers. Also, as we have gotten away from the pandemic, fewer consumers are saying that the pandemic is hindering their ability to receive services. A total of 69% of consumers say that the COVID-19 pandemic affected their experience receiving MRC services, but this total has been dropping each quarter.
19. Asian/Pacific Islanders were once identified as being slightly underserved by MRC VR in comparison to their proportion in the overall state population. Additionally, while MRC is serving other minorities in proportion or greater to the proportion of the statewide

population, MRC should focus on outreach to all minority communities to make sure their needs are met and to assist in addressing barriers to employment, and to ensure all communities have access to MRC VR services. This will help ensure MRC is providing inclusive and effective services to underserved and unserved communities across Massachusetts.

Individuals with disabilities who are minorities and individuals with disabilities who have been unserved or underserved by the VR program;

The CSNA report once again indicated the need for multiple VR services to be slightly greater amongst individuals of diverse ethnic and racial backgrounds. MRC once again found minority consumers were more likely to find on-the-job training, job-driven training, work-readiness/soft skills training, and vocational training as important service needs. The need for college education supports and transportation services were also higher amongst consumers of minority background compared to white consumers. Additionally, In the experience survey, 95% of consumers agreed with the statement: The MRC staff respected my culture and background, including my ethnicity, gender and sexual identity, religious beliefs, race, and place of origin. Among those who say the MRC staff did not respect their culture and background, 11% say that better communication is needed.

As the Commonwealth's population continues to become more ethnically and racially diverse, MRC's consumer population is also following this pattern, however MRC's consumer population remains about 75% while the 2020 Census indicates Massachusetts as a whole is 77.3%.

Over the past ten years, MRC has seen an increase in consumers from minority backgrounds but this has leveled off over the past few years. Over the past few years, MRC has seen a significant increase in the number of consumers choosing not to identify their race or ethnicity, increasing from 0.8% in FY2020 to 4.2% in FY2023. The percentage of white consumers has decreased slightly in the past 3-4 years from about 80% to 75%. The proportion of Native American consumers increased from FY2013 to FY2019 but has remained steady around 1% since. African Americans are served by the MRC at a higher rate (18%) than their rate in the overall population (7.4% in 2020 census), but his rate has also been steady since FY2020. Since FY 2013, MRC has seen a flat pattern in Asian consumers served. MRC was steady in terms of the proportion of Asian consumers served between FY2021 and FY2023, with a 0.1% increase from 3.8% in FY2021 to 3.9% in FY2022, but then a decrease back to 3.6% in FY2023. It continues to appear that Asians are underserved in comparison with their rate in the overall state population (3.6% of MRC consumers compared to 8.2% for all MA population). For Hispanic/Latinx ethnicity, MRC is serving these consumers at a rate slightly above their rate in the general population (13.5% for MRC vs 12.6% in the 2020 census for the state as a whole). The rate of Hispanic consumers served by MRC has remained steady since FY2020 after growing significantly from FY2013 to FY2019.

The MRC has again identified Asian and Pacific Islanders as being underserved by the MRC's Vocational Rehabilitation program compared to their proportion in the overall state population.

Growth in the Asian population continues to be seen in the state's general population while it has remained steady amongst the MRC population.

As growth in the Asian community continues to be seen in the state's general population, it is recommended that MRC continues its outreach efforts to Asian communities. Additionally, MRC should focus on outreach to all minority communities to make sure their needs are met and to assist in addressing barriers to employment and to ensure all communities are able to access VR services. It is also recommended that MRC continue to develop and implement its consumer engagement program which will include coordination of outreach services to community organizations in areas with underserved populations. MRC should also work with its Employee Resource Groups, Bilingual Committee, the SRC, its DEIA council and other groups to focus on outreach to diverse and underserved communities for all people of color to ensure all their needs are met.

The MRC has made a commitment to reach out to individuals with the most significant disabilities who are also ethnic and cultural minorities through its DEIA initiatives, Employee Resource Groups, Diversity Committee, through the work of the Office of Learning and Community Engagement and through its Language Access Plan. The MRC should continue these outreach efforts to ethnic and cultural minorities to increase participation in the VR program from these diverse communities, especially for people of color.

It is recommended MRC conduct additional community outreach meetings in Braintree/Quincy, Lowell, and Boston, and/or other areas with high population concentration of Asian communities, with consultation of the DEIA council, the Office of Consumer and Family Engagement, diversity and bilingual committees, and the SRC to review results and to develop best practices in collaboration with community organizations for increasing outreach efforts and services to the Asian community and all other communities of color, based on the findings of the Comprehensive Statewide Needs Assessment in order to ensure the needs of these communities are addressed in terms of Vocational Rehabilitation services.

Individuals with disabilities served through other components of the workforce development system; and

In order to meet the needs of individuals served through other components of the Statewide Workforce Development System, MRC continues its efforts to collaborate with the other core partners in the workforce investment system to reduce unemployment of individuals with disabilities and to provide effective services to employers throughout the state, to seek out collaborative opportunities including possible projects and grants that may assist individuals with disabilities across Massachusetts in obtaining competitive employment. MRC continues its efforts to work closely together with its partners on WIOA implementation including WIOA common performance measures, use of labor market information, co-location of staff, and other efforts. MRC participates in numerous workgroups such as the *State Plan* Steering Committee, WIOA Steering Committee, WIOA Systems Integration Workgroup, and other committees who are working on the alignment of services under the workforce system.

MRC continues its collaboration with other core partners under WIOA to survey and further identify the needs of individuals working with other components of the Workforce system. Some of the identified needs include interviewing skills, resume development, job specific skills (CVS Pharmacy Technician training, Certified Nursing Assistant (CNA) Program, retail job training, customer service jobs skills training, food service training, substance abuse counselor training, cybersecurity training, and human service training). MRC will continue to consult with core partners on the identified needs of their consumers as it relates to accessibility and access to employment opportunities, employment training, and provide employer trainings on disability awareness and job accommodations. MRC is reaching out to its core partners as part of its next needs assessment to gather additional data on the needs of individuals in the overall workforce system to complement and further enhance the CSNA process going forward. MRC will be reaching out to its core partners to gather additional data on the needs of individuals in the overall workforce system to complement and enhance the CSNA going forward.

The Massachusetts Rehabilitation Commission VR Program has a growing presence at the MassHire Career Centers; the MRC Commissioner serves on the State Workforce Board (SWB), and each MRC Area Director has a formal relationship with at least one MassHire Career Center. In addition, Area Directors or other MRC staff are on local workforce boards. MRC VR counseling staff make frequent visits and often conduct interviews at the local career centers and has leased space at all Career Centers to further increase MRC's presence. MRC has *MOUs* and infrastructure funding agreements with local areas and the Career Centers. Finally, the MRC's job placement team and other assigned MRC staff work closely with local MassHire Career Centers to provide high-quality vocational rehabilitation services to persons with disabilities seeking expanded employment opportunities and MRC is providing assistance to MassHire Career Centers so they can best meet the needs of individuals with disabilities.

MRC has partnered with MassHire on a training initiative known as the MassHire Training and Placement Collaborative Program where MRC is coordinating training services for MRC Job Seekers through the MassHire Career Center network, as part of efforts to coordinate service delivery across WIOA workforce partners in Massachusetts. An evaluation of the program revealed those completing trainings through this program had a higher employment rate than the overall MRC VR program, that most consumers obtaining employment after training obtained a job in a field related to the training, and consumers had higher wages, and particularly hours worked than the overall MRC VR population. The majority of those placed were in full time employment.

(1) Youth with disabilities, including students with disabilities and their need for pre-employment transition services. Include an assessment of the needs of individuals with disabilities for transition career services and pre-employment transition services, and the extent to which such services are coordinated with transition services provided under IDEA

- In the CSNA, Obtaining a high school diploma, Pre-Employment Transition Services, and college education were rated as important service needs by over 90% of youths with disabilities. With the continued increase in the proportion of youth consumers

responding to the CSNA, the importance of services related to obtaining a GED or high school diploma has remained elevated from prior to FY2021. As MRC continues to focus on providing services to youth and high school students, working directly with schools throughout the Commonwealth, and improving transition services through programs like Pre-ETS, this is expected to remain higher than historically observed due to the high need for transition and Pre-ETS services.

- The most important and needed Pre-Employment Transition Services listed by MRC consumers of transition age (14 through 21- up to their 22nd birthday) included internships/work-based learning experiences (85%), followed by learning about education/jobs/careers (job exploration counseling) (81%), work-readiness training (81%), transitioning from high school to college/work (80%), mentorship/peer counseling/self-advocacy (77%). Assistance with college education (76%), and college/career counseling (66%). Some consumers report they receive Pre-Employment Transition Services from schools outside of MRC, the frequency of the response's ranges from 17% for advocacy/peer counseling to 49% for work-based learning experiences. A total of 62% of consumers of transition age surveyed in FY2021 indicated they had received 1 or more Pre-ETS service.
- The majority of transition age consumers indicate they are satisfied with Pre-Employment Transition Services provided by MRC and their partners in meeting their needs towards future education and employment (62% Satisfied/Very Satisfied. and 19% Somewhat Satisfied), and the majority who are receiving these services (72%) indicate these services are effective in preparing them for their future career.
- Overall, results throughout the CSNA demonstrate a significant need for Pre-Employment Transition Services (Pre-ETS) among students with disabilities and youth consumers of transition age and MRC is working to address this need through its various transition and Pre-ETS initiatives. MRC continues to work closely with local school districts and contracted service providers on transition and Pre-ETS services, including coordinating services with those provided under the Individuals with Disabilities Education Act (IDEA). MRC has a counselor assigned to every public high school in the Commonwealth, has developed strong working relationships with the Department of Elementary and Secondary Education (DESE),

The FY2021 and FY2023/2024 CSNA confirms that transition career services and Pre-Employment Transition Services for youth and high school students with disabilities are important and needed services across the Commonwealth. Results throughout the CSNA demonstrate a high need for these services, including Pre-Employment Transition Services among students with disabilities and youth consumers of transition age and MRC continues to work address this need in coordination with schools and Pre-ETS contracted service providers across the state.

In the CSNA, Obtaining a high school diploma, Pre-Employment Transition Services, and college education were rated as important service needs by over 90% of youths with disabilities responding to the survey. The most important and needed Pre-Employment Transition Services listed by MRC consumers of transition age (14 through 21- up to their 22nd birthday) included

internships/work-based learning experiences (85%), followed by learning about education/jobs/careers (job exploration counseling) (81%), work-readiness training (81%), transitioning from high school to college/work (80%), mentorship/peer counseling/self-advocacy (77%), assistance with college education (76%), and college/career counseling (66%). Some consumers report they receive Pre-Employment Transition Services from schools outside of MRC, the frequency of the responses range from 17% for advocacy/peer counseling to 49% for work-based learning experiences. A total of 62% of consumers of transition age surveyed in FY2021 indicated they had received one or more Pre-ETS service.

MRC continues to work with local school districts and on transition and Pre-ETS services, including coordinating services with those provided under the Individuals with Disabilities Education Act (IDEA). MRC has a counselor assigned to every public high school in the Commonwealth, has developed strong working relationships with the Department of Elementary and Secondary Education (DESE).

MRC offers Pre-ETS to students who are potentially eligible for VR services in addition to those who are VR eligible in collaboration with vendors and school districts and has worked with providers and schools to implement remote and hybrid service delivery strategies and to deal with challenges in Pre-ETS and Transition service delivery related to the COVID-19 pandemic. MRC has developed an agreement and worked with DESE to issue guidance to schools on the provision and coordination of individualized transition services for students with disabilities that lead to successful post-school outcomes in competitive integrated employment, post-secondary education and training, and community living. To address the needs of students with disabilities, MRC will work to further strengthen collaboration efforts with Special Education programs with local educational agencies and the Department of Elementary and Secondary Education regarding provision of transition and pre-employment transition services to students with disabilities to coordinate activities, provide consultation, and encourage seamless access to the VR program.

- To assist in determining the statewide need for pre-employment transition services, MRC analyzed statewide data from the Massachusetts Department of Elementary and Secondary Education (DESE) (<https://profiles.doe.mass.edu/statereport/selectedpopulations.aspx>) According to DESE data, there are 179,095 students with disabilities (consisting of 19.4% of all high school students statewide) enrolled in public high schools in Massachusetts as of December 1, 2022, all who may be potentially eligible for VR services and/or who may benefit from Pre-ETS services. Based on this data and the continued high need for Pre-ETS services demonstrated throughout the CSNA as described above, MRC forecasts that once again, during FY2024 that it will need to expend its entire 15% expenditure requirement of VR funds to provide Pre-ETS services as required under WIOA (approximately \$8.4 million) in order to provide the five required Pre-ETS services to students with disabilities (work-based learning experiences, job exploration counseling, counseling on opportunities for enrollment in post-secondary education and other comprehensive training programs,

workplace readiness training, and instruction in self-advocacy). For its Pre-ETS fiscal forecasting process required in the CSNA, MRC forecasts that the entire 15% of resources is necessary for required Pre-ETS activities, and that no funding will remain to provide authorized pre-employment transition services beyond the five required services due to the number of students who may require Pre-ETS services as demonstrated in this year's CSNA findings and the DESE data

(1) Identify the need to establish, develop, or improve community rehabilitation programs within the State.

In terms of the need to establish, develop, or improve community rehabilitation programs within the State, most consumers appear to be satisfied with services received from Community Rehabilitation Providers (CRPs). The majority of MRC staff also indicate that they are generally satisfied with CRP services. The operation of CRP programs through the Competitive Integrated Employment Services (CIES) and Pre-Employment Transition Services (Pre-ETS) procurements appear to address many but not all consumer needs. There also appears to be some areas where additional CRP capacity may potentially be needed to cover certain geographic areas or specific populations, and this should be examined closer by MRC. MRC has also identified the need for CRPs across the Commonwealth to enhance their language access to assist individuals with disabilities who speak languages other than English to ensure these individuals are able to fully participate and benefit from services without language being a barrier and to ensure access to underserved communities. MRC also is working closely with CRPs as part of its ACCS employment initiative with the Department of Mental Health. MRC should continue to evaluate the impact of the COVID-19 pandemic on CRPs and use its working relationships to continue work collaboratively with CRPs to address consumer needs and improve service delivery, including the continued use of remote technologies and hybrid service delivery models. Finally, improved communication and information flow between CRPs and MRC staff, more information on consumer referrals, and continued efforts to streamline paperwork processing may assist in improving service delivery to consumers and lead to more successful employment outcomes.

MRC has issued an RFR to develop new strategies for VR operations including developing best practices for vendor-provided services through its CIES procurement.

(c) Goals, Priorities, and Strategies. Section 101(a)(15) and (23) of the Rehabilitation Act require VR agencies to describe the goals and priorities of the State in carrying out the VR and Supported Employment programs. The goals and priorities are based on (1) the most recent CSNA, including any updates; (2) the State's performance under the performance accountability measures of section 116 of WIOA; and (3) other available information on the operation and effectiveness of the VR program, including any reports received from the SRC and findings and recommendations from monitoring activities conducted under section 107 of the Rehabilitation Act. VR agencies must —

(1) Describe how the SRC and the VR agency jointly developed and agreed to the goals and priorities and any revisions; and

The Massachusetts Rehabilitation Commission has developed the following goals and priorities for the Vocational Rehabilitation and Supported Employment Programs. These have been identified based on the most recent Comprehensive Statewide Needs Assessments conducted in collaboration with the Statewide Rehabilitation Council (SRC) during fiscal year 2021 and 2023/2024 to survey the rehabilitation needs of individuals with disabilities. They are also based on recommendations and input from the SRC, and input from MRC Senior Management. Additionally, these goals include the WIOA Common Performance Measures. MRC will review progress towards these goals on at least a quarterly basis with senior management and the SRC. The SRC was involved with the development of the goals and has agreed to these goals.

(2) Identify measurable goals and priorities in carrying out the VR and Supported Employment programs and the basis for selecting the goals and priorities (e.g., CSNA, performance accountability measures, SRC recommendations, monitoring, other information). As required in section 101(a)(15)(D), (18), and (23), describe under each goal or priority, the strategies or methods used to achieve the goal or priority, including as applicable, description of strategies or methods that —

MRC has based its Vocational Rehabilitation and Supported Employment goals and priorities on the most recent *Comprehensive Statewide Needs Assessments* conducted in collaboration with the Statewide Rehabilitation Council (SRC) during fiscal year 2021 and 2023/2024 to survey the rehabilitation needs of individuals with disabilities. They are based on recommendations and input from the SRC, and input from MRC Senior Management. Additionally, these goals include the WIOA Common Performance Measures. The SRC was involved in the development of these goals as well.

The MRC has formulated agency specific goals following recommendations in conjunction with recommendations from the Statewide Rehabilitation Council (SRC) and the *Comprehensive Statewide Needs Assessment*. These goals were formulated with the overall MRC goals in mind; each of the 10 MRC goals have been identified and categorized as falling within statewide strategies and the following overall state goal. Targets will be reviewed on an annual basis during the 4-year *State Plan* and will be included in the two-year plan update.

Goal	Strategies	Metrics

Maximize labor force participation for adults and youth with disabilities	The Commonwealth stands up a Lead by Example strategy or Model Employer Initiative through HRD to hire more individuals with disabilities – Leverage MRC’s existing work with HRD – Scale-up efforts to encourage self-disclosure among Commonwealth employees	Number of individuals with disabilities hired by the Commonwealth
	Consider a statewide campaign to encourage employers to hire people with disabilities. – Work with employers to influence hiring practices – Develop/promote toolkit to assist employers	Number of individuals with disabilities hired through the campaign
	Align training efforts with existing sector strategies that are focused on state priority industries and occupations – Work to scale-up effective sector strategy models that successfully engage and boost employment for people with disabilities – Expand existing MDCS/MRC training partnership to align with targeted industries/occupations	Number trained in target industries/occupations Number of individuals with disabilities placed in employment
	Develop youth pathways to make connections to next step careers – Leverage success of NextGen – Build greater connectivity among school-to-career programs through partnerships with Special Education programs and DESE – Build cross-agency collaboration efforts with sister agencies such as DMH and DDS to support youths in career pathways	Number youth engaged in career pathways programming

(A) Support innovation and expansion activities;

The Massachusetts Rehabilitation Commission reserves and uses a portion of the funds allotted to the Commission under *section 110* of the Rehabilitation Act as Amended by the *Workforce Innovation and Opportunity Act* for the development and implementation of innovative approaches to expand and improve the provision of vocational rehabilitation services to individuals with disabilities under this *State Plan*, particularly individuals with the most significant disabilities. Consistent with the findings of the *Comprehensive Statewide Needs Assessment* and goals and priorities identified in conjunction with the State Rehabilitation Council, the Commission uses funds to support innovation and expansion activities to address the needs of individuals with disabilities, primarily individuals with the most significant disabilities. Activities include:

1. **Enhanced Business Relations Strategies:** MRC is developing enhanced business relations strategies through a variety of efforts including marketing and outreach to businesses to assist with hiring of individuals with disabilities. MRC is also working to increase awareness and utilization of the Massachusetts Disability Employment Tax Credit, a tax incentive program for employers, aimed at increasing employment opportunities for individuals with a disability in the Commonwealth. MRC is also expanding On-The-Job Trainings (OJT) and Job-Driven Trainings (JDT) with Employer Partners. MRC has found that many consumers who participate in an OJT or Job-Driven training obtain employment with the OJT or JDT. Other participants can obtain employment elsewhere as a result of their participation in the OJT or JDT because they gained recent work experience and/or developed job-specific skills. MRC has created job-driven training programs to date with the Home Depot, CVS Health, Lowes, CISCO, Red River Technologies, G4S Security Solutions, the Kraft Group, MAPFRE Insurance, Advance Auto Parts, and Enterprise Holdings, and Allied Universal Security Services, amongst other employers. In addition, MRC holds job-driven trainings for human service jobs, data analytics training and addiction recovery jobs. MRC also offers paid internships related to job-driven trainings. MRC will also work with its employer partners to coordinate training opportunities for individuals with disabilities on nights and weekends to accommodate those who are not able to attend these trainings during traditional work hours.
2. **MRC-Department of Mental Health Employment Initiative:** MRC coordinates employment services for individuals with mental health needs served by the Department of Mental Health's Adult Clinical Community Services (ACCS) program in collaboration with DMH and its vendors. The new MRC/DMH Employment Initiative is designed to build an integrated employment framework that inspires and engages innovation to ensure full employment for people with mental health needs at the same rate of employment as the general population. The focus of this initiative is on individuals served by DMH through Adult Community Clinical Services (ACCS). These individuals are being referred to MRC for Vocational Rehabilitation Employment Services. To serve these individuals, MRC is using an Integrated Resource Team approach, where partner agencies and supports come together to craft and jointly own a Job Seeker's employment goal, to coordinate wrap-around services and ongoing collaboration and communication. MRC has a team of dedicated staff to work with ACCS referrals. These counselors have smaller caseloads and will work with MRC CIES providers, DMH providers, DMH, and other MRC staff to rapidly engage with consumers, develop a plan for employment, and coordinate services designed to assist these consumers in achieving successful employment outcomes.
3. **Consumer Technology Initiative** to obtain hardware and software for consumers to assist with accessing services remotely and to assist with applying for and obtaining

employment, including technical support from a vendor to assist with issues related to the technology, and training on how to use the technology.

4. Software essentials training for MRC consumers to obtain skills in industry-leading software such as Microsoft Office Suite, basics of modern computing and internet technology including the skills to work remotely in today's virtual environment
5. IT enhancements to modernize the agency's technology and to improve the effectiveness and efficiency of services. MRC continues to develop a new case management system for both Vocational Rehabilitation and its Community Living divisions known as OneMRC. This new modern platform will modernize the agency's case management and reporting and will include a provider portal to assist in reporting and tracking the provision of Pre-ETS services to potentially eligible consumers, to enhance tracking and reporting on internal job placement services, to develop a consumer portal for information and referral, and to move the agency to a fully paperless system. This system will also enhance reporting and data available to staff and will bring data down to the office and caseload level to assist with data driven decision making to help improve services to MRC consumers. Additionally, MRC has procured Tableau Server to create interactive data dashboards to provide tools for evaluation to assist in business improvement, quality assurance and management, and to inform improved service delivery and outcomes for individuals served by the agency. This integrated case management system will assist in improving efficiency and will assist in streamlining service delivery for individuals served by MRC by allowing easier coordination between MRC programs, as well as improve information sharing and coordinating between MRC consumers, providers, and staff.
6. MRC's Business Relations Unit operates an annual Federal Hiring Event in partnership with MCB, other workforce partners, and the Office of Federal Contract Compliance Programs (OFCCP) in their Boston and Hartford offices. The Hiring Event assists consumers with securing competitive employment comparable with their interests and abilities. MRC prepares consumers to interview for available jobs with employers participating in the event. It focuses on direct job placement with participating employers and is not simply a career fair. MRC completed its 11th hiring event in 2023. Since 2013, Over 610 individuals have been successfully employed across the Commonwealth through participating in this annual one-day event. The aggregate annual wages of all successfully employed consumers through the hiring event since 2013 is approximately \$13.1 million. Consumers have been employed in a variety of occupations ranging from office and administrative support, health care, protective service, human services, and management occupations, amongst others.
7. Employment of Individuals with Disabilities in State Jobs: MRC places numerous individuals with disabilities into state government jobs each year, including at MRC. MRC has a diverse workforce with a high percentage of individuals with disabilities in

the workforce. We have a key contact with the state's Human Resources Division to facilitate employment for consumers in state jobs, including the provision of On-The-Job training and internship opportunities with state and federal agencies. The Commonwealth also participates in MRC's annual hiring event to provide information to consumers on available state job opportunities, including how to apply.

8. Learn to Earn: MRC is engaged with the Learn to Earn initiative. Learn to Earn is a comprehensive approach to providing unemployed and underemployed individuals who are receiving assistance from public benefit programs with the supports, skills, and credentials they need to gain and retain employment in occupations for which employers have persistent demand. Learn to Earn Programs will help participants set and achieve goals necessary for employment and sustained economic stability, such as maintaining and growing family net resources and minimizing the real or perceived potential impact of increased earned income on benefit receipt, including improving coordination across benefit programs and reducing benefit cliff effects. As part of this program, MRC is providing information on benefits counseling. An interactive data dashboard is also being developed to show data from multiple state programs to monitor progress. As part of this effort, MRC has issued and awarded RFR to identify innovative solutions to address wage reporting barriers for consumers receiving SSI and SSDI benefits, by creating a waiver application to amend several administrative aspects of SSA benefits for MRC VR consumers related to benefit offset amounts and cliff effects, wage reporting, and eligibility extended eligibility post-employment. This work aims to ensure these individuals build long-term career paths and aims to address the cliff effect as it relates to SSA benefits and employment.
9. Apprenticeships: MRC will utilize available apprenticeship resources, including the ODEP guide to expand apprenticeship, to provide apprenticeship opportunities for individuals with disabilities across the Commonwealth. As an example, MRC participates in the Merit Apprenticeship Program. Additionally, MRC has obtained a copy of the ODEP guide on apprenticeships. MRC will also work with the Career Centers on providing apprenticeship opportunities for consumers. MRC has leased space at the career centers and has staff dedicated to the career centers to make available the range of career services from Career Centers for MRC consumers. MRC has made a new connection with the Department of Labor and is working on strategies as part of its cybersecurity Job Driven Training program. MRC continues to work directly with the Executive Office of Division of Apprentice Standards to identify apprenticeships within all labor market sectors. Additionally, MRC consumers participate in our On-the-Job Evaluation programs within the Division of Apprentice Standards.
10. MRC partners and contracts with the Asperger/Autism Network's (AANE) Life Management Assistance Program (LifeMAP). This program provides practical assistance

to individuals on the Autism Spectrum and other related conditions. LifeMAP provides intensive, highly individualized coaching by professionals with expertise in both Autism Spectrum Disorder and specific content areas. Coaches focus on identifying and overcoming the specific barriers each client faces so that the clients can increase their levels of independence towards reaching their full potential.

11. Collaboration with the Department of Developmental Services (DDS): MRC and DDS have entered into a new Memorandum of Understanding outlining efforts to increase collaboration between the two agencies. Efforts that will be undertaken under the new MOU include development of new strategies to streamline referral, eligibility, and service planning for DDS eligible individuals served by MRC, increased information sharing and service coordination for mutually served participants, use of an integrated resource team approach, benefits planning, and coordination of long term supports for those DDS eligible consumers who obtain employment with assistance from MRC, among others.
12. Good News Garage donated vehicle program - This program assists in breaking down transportation barriers by providing refurbished donated vehicles to people with disabilities served by MRC to provide necessary transportation to and from employment. Individuals receive training on basic car maintenance and are responsible for registering, insuring, and maintaining the vehicle with their own resources.
13. MRC Marketing and Rebranding efforts: MRC operates a Marketing and Communications Department. The department is working on developing new strategies to communicate with MRC consumers and stakeholders, including increased use of social media and digital communication tools and a major campaign to rebrand MRC and increase awareness of MRC services. MRC has contracted with a vendor as part of these efforts to elevate awareness of MRC services to individuals with disabilities and their families, providers, employers, partners, allies, and the public. These efforts also include working with employers to increase employment of individual with disabilities across Massachusetts and increasing awareness and utilization of the Massachusetts Disability Tax Credit, a tax incentive program for employers, aimed at increasing employment opportunities for individuals with a disability in the Commonwealth. As part of these efforts, legislation has been filed by Governor Healey (bill H.4161) to change the name of MRC to MassAbility, a more inclusive name and brand.

(B) Overcome barriers to accessing VR and supported employment services;

MRC strategies to overcome barriers relating to access to and participation of individuals with disabilities in the MRC VR Services Program and the MRC Supported Employment Services Program include the following. MRC is committed to equitable access to VR services and is focused on numerous diversity, equity, inclusion, and accessibility initiatives to help promote

equity in MRC service delivery and outreach to diverse communities to ensure their needs are being met:

1. MRC Connect Integrated Eligibility Project: MRC has completed an integrated eligibility process for the agency known as MRC Connect. MRC Connect provides a dedicated and virtual team that guides an applicant through a cross-program application process for MRC's VR program as well as MRC's CL programs. A standardized application/referral form on MRC's website initiates the process by collecting information from applicants based on their needs, and then the team engages applicants to streamline their eligibility determination across multiple programs as applicable, including determination of eligibility for VR. This process is intended to improve the ease and access for individuals with disabilities to access MRC services and obtain information on services, including Vocational Rehabilitation services. Through an integrated approach, VR participants have access to additional services and supports within the agency to support their efforts to achieve a career outcome.
2. VR Operations Strategies RFR: The Massachusetts Rehabilitation Commission's (MRC) Vocational Rehabilitation Division (VR) is engaged in piloting several projects which have yielded some emerging best practices and enhancements to the delivery of VR services. MRC has issued an RFR for a vendor to document these practices, develop strategies and timelines to scale these across the VR division, and to work in partnership with MRC personnel and stakeholders to strategize, develop and/or enhance VR services by:
 - a. Documenting Vocational Rehabilitation best practices and develop workplan for implementation into VR practice.
 - b. Develop, in partnership with agency staff and stakeholders, a comprehensive new employee Vocational Rehabilitation counselor training.
 - c. Develop and support implementation of an Entrepreneurship/Self-Employment approach for VR individuals based on best practices.
 - d. Research, develop, and document a strategy to support the enhancement of MRC's Competitive Integrated Employment Services (CIES) model to integrate additional job-related support services.
3. Outreach activities to identify and serve individuals with the most significant disabilities. MRC conducts outreach to community and state agencies, schools, other public institutions, and the general public. This is accomplished through direct contact and presentations by MRC local office, district and administrative staff, use of printed brochures, and agency consumer and employer trainings.
4. The MRC Supported Employment Program provides Supported Employment Services to consumers statewide through its local Area Offices. Services are coordinated by MRC counselors using a network of community rehabilitation providers, links with the local

school system for transitioning youth and other state agencies such as the Department of Developmental Services and the Department of Mental Health, especially through its clubhouse programs.

5. MRC has an ongoing statewide Bilingual/Bicultural vocational rehabilitation counselor group who meet on a regular basis to discuss and share resources on how to outreach to and serve cultural and ethnic minorities, develop new or translate existing agency forms and brochures, and develop and conduct training programs for local and district offices in collaboration with the Commission's staff development unit. MRC has twelve VR counselors skilled in American Sign Language (ASL) and are qualified to work with consumers who are Deaf or Hard-of-Hearing; thirty are fluent in Spanish and work with Hispanic consumers; four are able to communicate in Cantonese; two in Vietnamese, three are fluent in Portuguese; three are fluent in Khmer, three are fluent in French/Haitian Creole, and one counselor is fluent in Hindi and Tamil. A smaller number of area directors, head clerks and other clerical staff are fluent in American Sign Language, Spanish, Khmer, Cantonese, Mandarin, Haitian Creole, or Portuguese. Eleven full- and part-time sign language interpreters are also on staff. The Commission also maintains a statewide contract with the Massachusetts Commission for the Deaf and Hard-of-Hearing to secure additional ASL interpreters and CART reporters, as needed. Staff with specific language skills and interpreters are geographically placed to coincide with population and other demographics relating to target consumer groups.
6. DEIA Projects – MRC is working on numerous DEIA efforts focused on creating a more diverse agency workforce and to promote employment of individuals from diverse ethnic and racial backgrounds into higher wage employment and career pathways to increase self-sufficiency and promote equality. MRC is also working on the creation of a DEI Strategy and Implementation Plan and has created a Diversity, Equity, Inclusion, and Accessibility (DEIA) Council consisting of a cross-section of stakeholders. MRC has also developed Employee Resource Groups (ERGs) to assist these efforts. MRC is also working on promoting accessibility to its services and is committed to efforts related to Governor Healey's Executive Order on Accessibility to make state government online resources more accessible to those with disabilities and increase equity in the Commonwealth.
7. MRC Marketing and Communication Department and agency rebranding efforts – MRC operates a Marketing and Communications Department. The department is working on developing new strategies to communicate with MRC consumers and stakeholders, including increased use of social media and digital communication tools and a major campaign to rebrand MRC and increase awareness of MRC services. These efforts seek to elevate awareness of VR services to individuals with disabilities and their families, providers, employers, partners, allies, and the public to increase the visibility of the VR program to assist with staffing and recruitment of consumers. MRC is also implementing

communication and marketing strategies to increase referrals to the MRC VR program, including efforts to ensure culturally mindful engagement to increase and improve services to underserved and underrepresented populations. MRC is also implementing a business relations marketing strategy to the business and employer community, elevating awareness of agency services, and developing connections to assist in employing individuals with disabilities with businesses across the Commonwealth. As part of these efforts, legislation has been filed by Governor Healey to change the name of MRC to a more inclusive name and brand.

8. Department of Learning and Consumer Engagement – As part of MRC’s commitment to elevating the voices and leadership of the disability community within all decision-making spaces at MRC, the Office of Individual and Family Engagement was brought to life in 2020. The office is charged with developing a plan for the agency to work with MRC consumers and their families to solicit input on new initiatives and operational issues and provide opportunities for ongoing dialogue. In recent months, The Office of Individual and Family Engagement has developed multiple platforms to listen and learn from MRC Consumers. In October 2021, MRC hosted it’s second Listening and Learning Forum, a two-hour virtual space to bring together disability community members, families, and professional stakeholders to learn about MRC Services directly from other consumers, provide feedback on upcoming MRC initiatives, and engage in community peer support. Additionally, MRC disseminated its first consumer and family newsletter in November 2021, focused on providing success stories, event highlights, and ongoing resources for consumers and their supporters.
9. Language access starts at the front door through MRC Connect with the online application available in 11 languages and access for those who use American Sign Language. MRC has also translated key forms and informational materials and correspondence letters in its case management system into Spanish, Portuguese, Russian, French Creole, Khmer, Vietnamese, and Mandarin Chinese as outlined in MRC’s Language Access Plan. MRC also works to coordinate outreach services to community organizations in areas with underserved populations. MRC will continue to work with its Employee Resource Groups, Bilingual Committee, the SRC, its DEIA council and other groups to focus on outreach to diverse and underserved communities and develop appropriate training programs for staff to promote language access and broader access to services without barriers.
10. MRC is working to ensure equitable access to services for consumers with Autism. MRC has worked with several organizations such as The Asperger/Autism Network (AANE) to provide training to staff and providers on the needs of individuals with autism, including competency to address behavioral, communication (including Alternative Augmentative Communication or AAC), sensory, social, and generalization needs. This will assist MRC staff in developing the capacity to address behavioral, communication (including AAC),

sensory, social, and generalization needs for consumers. MRC also works with AANE to provide life-mapping services to individuals on the Autism spectrum to ensure equitable access.

11. MRC partners and contracts with the Federation for Children with Special Needs to assist families in accessing MRC services, including Pre-Employment Transition Services (Pre-ETS) and the NextGen Careers project. MRC has brought on a group of Disability Inclusion Leaders and family allies who engage in part-time contracted positions at MRC and are embedded in agency initiatives to have a direct impact on systems change at cross-agency level. to assist MRC. These individuals are assisting MRC by providing a first-hand experience of living with disabilities and providing feedback and assistance to guide MRC in developing programs, resources, and policies that strengthen the lives of people living with disabilities, family members, their caregivers, and medical providers.
12. MRC's NextGen Careers grants is focusing on serving youth aged 18-30 with a focus on underserved populations to assist in the employment of individuals with disabilities in STEM and other high wage occupational areas and to utilize a team approach for providing services to young adults with disabilities. This project is currently in its third year and is serving more than 400 young adults to date.
13. Learn to Earn RFR: MRC is issuing a RFR to identify innovative solutions to address wage reporting barriers for consumers receiving SSI and SSDI benefits, by creating a waiver application to amend several administrative aspects of SSA benefits for MRC VR consumers related to benefit offset amounts and cliff effects, wage reporting, and eligibility extended eligibility post-employment. This work aims to ensure these individuals build long-term career paths and aims to address the cliff effect as it relates to SSA benefits and employment.
14. Empower to Employ - MRC operates the Empower to Employ program partnership with DTA, an initiative designed to assist individuals with disabilities served by DTA in obtaining competitive employment opportunities through MRC. This program focused on providing a solid foundation of services to provide support to job seekers and then explore their path to employment with education and training supports provided through MRC and DTA.

(B) Overcome barriers to accessing VR and supported employment services

The Massachusetts Rehabilitation Commission, in cooperation with the State Rehabilitation Council (SRC), conducted a needs assessment (CSNA) during Federal Fiscal Year 2021 to survey the rehabilitation needs of individuals with disabilities residing within the state. Strategies of the Vocational Rehabilitation and Supported Employment programs are established consistent with the needs and trends identified in the survey results as necessary for vocational rehabilitation to achieve its goals and priorities, support innovation and expand activities. These

strategies are designed to overcome any barriers to accessing the VR and the Supported Employment programs and promote the abilities of people with disabilities to reduce stigmas. Strategies are developed with consultation of the SRC and other stakeholders.

Some strategies developed through this process, as described in the sections below, include development and refinement of MRC's pre-employment transition service (Pre-ETS) contracting; the operation of the ACCS employment model with the Department of Mental Health to assist consumers with mental health needs to obtain employment, designed to rapidly engage individuals in the Vocational Rehabilitation process; and continued expansion of a project with the Department of Transitional Assistance to use the concepts of the Integrated Resource Team (IRT) model to engage and employ individuals with disabilities receiving TANF benefits, among other strategies.

MRC is operating a 5-year Innovation Demonstration Grant project from the Rehabilitation Services administration. This program, known as NextGen Careers, is focused on developing new strategies and practices to serve young adults as an alternative to standard VR, focused on enhancing factors shown to have a positive impact on employment and career advancement, leading to increased employment and wages.

Recognizing the critical need for access to technology during the pandemic and beyond, MRC was able to identify and deploy resources to assist with technology needs of consumers who are eager to return to work, including the deployment of laptops, printers, monitors, keyboards and mice, and headsets. In addition to equipment, MRC has provided funding for a "software essentials" training class.

MRC is also implementing strategies to increase the use of data driven decision making. MRC is developing a new case management system known as OneMRC for its Vocational Rehabilitation and Community Living divisions. The goal for this system is to provide additional automated reporting for managers, supervisors, and counselors to be able to easily access information at the statewide, district, office, and counselor level to inform decisions to help improve service delivery to MRC consumers, including the use of Tableau to provide interactive dashboards to staff to assist with measuring agency performance on WIOA Common Measures and other Key Performance Indicators. This will also include consumer and provider portals into the system to help improve services.

MRC has developed a new Consumer Experience Survey to assist with assessment of consumer satisfaction and consumer needs. MRC has developed a workgroup and is working with an experienced vendor on the implementation of this effort, which includes a consumer, staff, employer, and provider survey process. The first year of data collection was recently completed and has been modified and improved in the second year based on an evaluation of the initial year's experience survey instrument and results. Data from these surveys will be used in efforts to improve services to MRC consumers and the experience for MRC staff, providers, and other stakeholders.

- (C) Improve and expand VR services for students with disabilities, including the coordination of services designed to facilitate the transition of such students from school to postsecondary life (including the receipt of VR services, post-secondary education, employment, and pre-employment transition services)**

Based on the findings of the Comprehensive Statewide Needs Assessment, MRC continues to implement strategies to address the needs of students with disabilities, including Pre-Employment Transition Services, through many efforts, including a multi-million-dollar procurement to provide Pre-ETS services to eligible and potentially eligible consumers. For eligible consumers, specific services are addressed in the consumers' individualized plan for employment based on their interests, choice, and needs. MRC continues its efforts to closely coordinate transition services and Pre-Employment Transition Services with local educational agencies. MRC has also worked with schools and its service providers on remote service delivery strategies to ensure youths and students with disabilities continued to receive transition and pre-employment transition services during the COVID-19 pandemic. Most services have transitioned back into hybrid and or in-person services.

Through its MOU with the Department of Elementary and Secondary Education (DESE), MRC operates a working group to identify needs and best practices to improve and expand services for students with disabilities, including Pre-Employment Transition Services. MRC will continue to work closely with DESE to further coordinate service efforts and DESE has produced guidance for local school districts on working with MRC to coordinate transition services, including amending, and refining the MOU as needed. This is incorporated as part of MRC's strategic planning process

MRC is also partnering with the Massachusetts Inclusive Concurrent Enrollment Initiative (MAICEI), which funds partnerships between local school districts and two- and four-year public colleges and universities in Massachusetts. The term "Concurrent Enrollment" means that participating students are still eligible for special education services, even though they have finished four years of high school. Students in MAICEI programs are enrolled in college while at the same time receiving special education services through the school district providing that support. Students participating in MAICEI are fully included in the campus community as they develop their capacities in career-planning and employment, self-advocacy, and other self-determined abilities that support their post-secondary interests and activities.

- (A) Improve the performance of the VR and Supported Employment programs in assisting individuals with disabilities to achieve quality employment outcomes.**

MRC Goal 1:

Create career pathways for job seekers through increasing Employment Outcomes through placement, training, and Job Driven Trainings provided through MRC's Job Placement Unit,

Employer Account Management System, and Annual Statewide Hiring Event. Continue to coordinate these business engagement efforts with WIOA partners as part of the overall MassHire Massachusetts workforce system.

Key Performance Indicators:

Continue measuring Key Performance Indicators related to Successful Employment Outcomes (SEO's) including:

- Total number and percent of Successful Employment Outcomes for Vocational Rehabilitation Division and percentage change over the prior year's results
- Total Employment Rate for MRC VR consumers at time of Exit from VR Program
- Total number and percent of Successful Employment Outcomes achieved through the involvement of the MRC Job Placement Unit in the current fiscal year and percentage change over the prior year's results
- Total number and percent of Successful Employment Outcomes (Status 26 Closures) from consumers participating in MRC's annual Statewide Hiring Event in the current fiscal year and percentage change over the prior year's results
- Employment Rate for consumers participating in On-The-Job Trainings and Job Driven Trainings coordinated by MRC.
- Increase in the number and percentage of job seekers placed into high wage occupations and industries.

Target:

MRC's target goals:

- 3,200 Successful Employment Outcomes for MRC's Vocational Rehabilitation Division and 3% a positive percentage change over prior year results, with 15% of all VR eligible consumers served achieving a successful employment outcome
- 60% or Higher Annual Employment Rate at Time of Exit for VR (Ratio of successful to unsuccessful closures)
- Exceed 500 Successful Employment Outcomes, or 11% of all SEOs, for MRC's Job Placement Unit annually and a positive percentage change over prior year results, and a 60% or higher employment rate
- 45% Successful Employment Outcomes for consumers participating in Statewide Hiring Event achieve annually, a 3% increase over prior year's outcomes
- 60% or higher employment rate for consumers participating in On-The-Job Trainings and Job-Driven Trainings coordinated by MRC.
- 20% or greater increase in the number and percentage of MRC job seekers placed into high wage occupations and industries based on Standard Occupational Code.

Data Sources:

MRCIS, OneMRC

Frequency of Evaluation:

Progress toward completing this goal will be evaluated annually

Overall WIOA Combined State Plan Category:

Maximize labor force participation for adults and youths with disabilities

MRC Goal 2:

Continue to operate a joint venture using the MRC Competitive Integrated Employment Service (CIES) program and the Adult Clinical Community Services (ACCS) program with the Department of Mental Health (DMH) to increase employment outcomes and create career pathways to better meet the needs of individuals with Behavioral Health needs utilizing the Integrated Resource Team (IRT) Model and the CIES Pay for Performance competitive employment model.

Key Performance Indicators:

MRC will evaluate the ACCS program based on Key Performance Indicators.

- MRC ACCS Job Seekers served by program/fiscal year
- MRC ACCS Job Seekers initiated engagement with internal Job Placement Services
- MRC ACCS Job Seekers having a completed IPE within 45 days from eligibility
- MRC ACCS Job Seekers initiating Placement Services from CIES-ACCS providers or MRC Job Placement Unit Staff as part of their ACCS services
- MRC ACCS Job Seekers receiving Benefits Planning as part of their MRC ACCS services
- MRC ACCS Job Seekers successfully being placed into employment through CIES-ACCS and MRC Job Placement Unit services
- MRC ACCS Job Seekers are successfully maintaining employment for 90 and 180 days through ACCS-CIES and Internal MRC Job Placement services AND Employment Rate for MRC ACCS job seekers
- MRC ACCS Job Seekers placed who are working an average and median of 25+ hours/week
- MRC ACCS Job Seekers placed receiving an average hourly wage of \$19/hour and a median hourly wage of \$17/hour and percentage increase in the wages from prior fiscal year.
- Increase in the number and percentage of MRC ACCS job seekers employed in high wage occupations and industries.
- Increase in the number of MRC ACCS job seekers participating in job driven trainings and education/training programs.
- 80% of MRC ACCS Job Seekers satisfied with CIES-ACCS Services they received

Target:

- MRC ACCS Counselors will serve 1,800 job seekers annually based on the caseload capacity goal of 50 per caseload
- 200 ACCS Job Seekers engaging with internal Job Placement Services annually
- 70% or more of MRC ACCS Job Seekers will have a completed IPE within 40 days from eligibility
- 40% or more of MRC ACCS Job Seekers receiving services from CIES-ACCS providers within the program year
- 60% or more of MRC ACCS Job Seekers with Social Security Insurance or Social Security Disability Insurance are receiving Benefits Planning as part of their MRC ACCS services
- 40% of MRC ACCS Job Seekers will be successfully being placed into employment through CIES-ACCS and MRC Job Placement Unit services
- 75% of Job Seekers will successfully maintain employment after placement for 90 and 180 days through ACCS-CIES and Internal MRC Job Placement services. 60% or higher employment rate for consumers participating in MRC ACCS services.
- MRC ACCS Job Seekers placed work an average and median of 25 hours/week
- MRC ACCS Job Seekers placed receive an average hourly wage of \$19/hour and a median hourly wage of \$17/hour and increase in wages from prior fiscal year.
- 80% of MRC ACCS Job Seekers are satisfied with CIES-ACCS Services they received
- 20% Increase in MRC ACCS job seekers placed into high wage occupations (as defined by Standard Occupational Code
- 40% increase in MRC ACCS job seekers engaged in Job Driven Trainings and education/career training.

Data Sources:

MRCIS, One MRC, MRC Consumer Experience Survey

Frequency of Evaluation:

Progress toward completing this goal will be evaluated on an ongoing basis, including quarterly and annually

Overall WIOA Combined State Plan Category:

Maximize labor force participation for adults and youths with disabilities

MRC Goal 3:

- Operate the “Empower to Employ” program in collaboration with the Department of Transitional Assistance (DTA) in order to work to improve services and outcomes for individuals with disabilities receiving TANF support utilizing the Integrated Resource Team Model and the Pay for Performance competitive employment model. This project is part of MRC’s efforts with its WIOA partners to align and coordinate services amongst state partners.

Key Performance Indicators:

- MRC will evaluate the Empower to Employ program using Key Performance Indicators with DTA and will update as required focusing on employment outcomes, employment rate, and wages/hours worked for employed participants.

Target:

- Increase services to allow 75 or more placements annually for the project
- Employment Rate of 60% or Greater for ETE Program Participants
- Employed project participants will earn an average hourly wage of \$20.00 or more and work an average of 30 hours or more per week

Data Sources:

MRCIS, One MRC

A

Progress toward completing this goal will be evaluated quarterly and annually

Overall WIOA Combined State Plan Category:

Maximize labor force participation for adults and youths with disabilities

MRC Goal 4:

- Maximize Performance on the *WIOA Common Performance Measures*

Key Performance Indicators:

Measure the following metric to gauge progress toward Goal 4:

- Employment Rate at the 2nd Quarter after Exit for MRC Consumers closed during the Current Program Year (Successful and Unsuccessful closures) based on Unemployment Insurance Wage Earnings
- Employment Rate at the 4th Quarter after Exit for MRC Consumers closed during the Current Program Year (Successful and Unsuccessful closures) based on Unemployment Insurance Wage Earnings
- Median Quarterly Earnings at the 2nd Quarter after Exit for MRC Consumers closed during the Current Program Year (Successful and Unsuccessful closures) based on Unemployment Insurance Wage Earnings
- Percent of MRC Consumers obtaining recognized post-secondary credentials and/or obtaining a secondary school diploma or equivalent during participation in the MRC VR Program (or up to 1 year after exit from program)
- Percent of MRC Consumers enrolled in education and training programs leading to employment or a recognized secondary or post-secondary credential achieving measurable skills gains during the program year with documented progress divided by total number of consumers enrolled in education or training in MRCIS
- Employment retention rate with the same employer at 2nd and 4th quarter after exit for MRC consumers closed during the current program year (Status 26 Closures) based on Employer Tax ID (EIN) in Unemployment Insurance Wage Data

Target:

Data Sources:

Status 26 Closure Data from MRCIS/OnBase, RSA—911 File, WIOA Annual Report

Frequency of Evaluation:

Progress toward completing this goal will be evaluated annually

Overall WIOA Combined State Plan Category:

Maximize labor force participation for adults and youths with disabilities

MRC Goal 5:

- Increase earnings and hours worked for MRC Consumers placed into Employment. Increase the number and percentage of MRC Consumers employed in STEM and other higher wage occupational areas as defined by Standard Occupational Code (SOC).

Next Steps:

Evaluate the following criteria in order to track progress of Goal 5

- Increase in Average and Median Hourly Wage for Employed MRC Consumers
- Increase in Average and Median Hours Worked for Employed MRC Consumers
- Number and percent of MRC Consumers Employed in Higher Wage Occupational Areas

Target:

- Achieve a \$21.00 or higher annual average wage for Employed MRC Consumers and a \$18.50 or higher Median Wage
- Achieve 29 or higher average and median hours worked per week for Employed MRC Consumers
- 20% increase in the number and % of MRC Consumers Employed in Higher Wage Occupational Areas (Defined as SOC Major Group Codes 11, 13, 15, 17, 19, 21, 23, 25, 27, 29, and 47)

Data Sources: *MRCIS, OneMRC Monthly Key Performance Indicators Tracking Report*

Frequency of Evaluation:

Progress toward completing this goal will be evaluated monthly and annually.

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment.

MRC Goal 6

- Maximize the Number and Percentage of high school students receiving Pre-Employment Transition Services, including work-based learning experiences (Pre-ETS/Potentially Eligible) from MRC, either eligible or potentially eligible. Continue to coordinate Pre-ETS service delivery with partners and schools.

Key Performance Indicators:

Evaluate the following criteria in order to track progress of Goal 6:

- Number of students (potentially eligible and eligible) receiving Pre-Employment Transition Services (Pre-ETS) from MRC and its contracted providers during the program year
- Percent of students initiating services for each of the five Pre-ETS services (Work-Based Learning, Job Exploration Counseling, Counseling on Enrollment in Post-Secondary Education, Workplace Readiness Training, Self-Advocacy) from MRC and its contracted provider
- Explore ways to work with DESE and other partners to coordinate Pre-ETS services
- Percent of Potentially Eligible Consumers who Apply for VR Services
- Implementation of enhanced strategies with DESE and Local Educational Authorities/Special Education Program to coordinate and collaborate on Pre-ETS and transition services benefiting students with disabilities.
- Increase in the number of referrals for VR services from Local Educational Authorities

Target:

- Serve 3,500 or more students receiving one or more of the five Pre-ETS services during the program year
- An average of 80% of students will initiate services for each of the five Pre-ETS services (Work-Based Learning, Job Exploration Counseling, Counseling on Enrollment in Post-Secondary Education, Workplace Readiness Training, Self-Advocacy) from MRC and its contracted providers during the program year
- 20% or Greater of Potentially Eligible Consumers Apply for VR Services
- Set up meetings with DESE and workforce partners to discuss coordination of Pre-ETS Services
- Implementation of new objectives with coordination of Pre-ETS Services and other transition services.
- Increase in the number of referrals for VR services from Local Educational Authorities from prior year

Data Sources:

MRCIS, One MRC

Frequency of Evaluation:

Progress toward completing this goal will be evaluated annually

Overall WIOA Combined State Plan Category:

Maximize labor force participation for adults and youths with disabilities

MRC Goal 7:

- Create career pathways for job seekers through maximizing the Number of Successful Competitive Employment outcomes and the percent of Placements leading to Successful Employment Outcomes through MRC's Competitive Integrated Employment Services (CIES) programs in partnership with Community Rehabilitation Providers.

Key Performance Indicators:

Evaluate the following criteria to track progress of Goal 7:

- Total Number of 90-Day Successful Employment Outcomes from CIES Program; Total Number of CIES Successful Employment Outcomes divided by the total number of 30-Day Placements for the CIES Program, percent% of CIES consumers served achieving a placement.

Target:

- Exceed 700 Successful Employment Outcomes for CIES for the fiscal year and greater than 75% of CIES placements result in successful employment outcomes, and 50% or more of CIES consumers served during the year are placed into employment.
- 20% increase in the average and median wages of consumers placed through CIES
- 20% increase in the proportion of those placed into high wage occupations through CIES
- 20% increase in the number and percent of consumers employed through CIES services from diverse racial and ethnic background and 30% increase in wages for these consumers.

Data Source:

MRC CIES Quarterly Cumulative Utilization Report and Annual Program Evaluation Report

Frequency of Evaluation:

Progress toward completing this goal will be evaluated monthly and annually.

Overall WIOA Combined State Plan Category:

Maximize labor force participation for adults and youths with disabilities.

MRC Goal 8:

As part of MRC's updated MOU with the Department of Developmental Services (DDS), implement new strategies and efforts to boost collaboration and coordination of DDS eligible consumers served by MRC, and increase the number of mutually served individuals between MRC and DDS and the employment rate for those mutually served consumers achieving career outcomes.

Key Performance Indicators:

Target:

- 15% annual increase in DDS eligible consumers served by MRC from the prior fiscal year.
- 60% or greater employment rate for consumers with autism spectrum receiving VR services
- Successful implementation of key objectives from the MRC-DDS MOU by the end of the state plan period

Data Sources:

MRCIS/One MRC, progress reports from implementation of MOU

Frequency of Evaluation:

Progress toward completing this goal will be evaluated quarterly and annually.

Overall WIOA Combined State Plan Category:

Maximize labor force participation for adults and youths with disabilities.

MRC Goal 9:

- Provide Quality Vocational Rehabilitation Services leading to increased successful employment outcomes to individuals with Autism. Coordinate services for individuals with Autism with partners.
- This aligns with Goal III of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria in order to track progress of Goal 9:

- Number of successful employment outcomes as defined by successful closures for MRC consumers with a Primary and/or Secondary RSA Disability Cause Code of Autism and employment rate for these consumers
- Number of consumers served on the Autism Spectrum

Target:

- Equal or greater to 250 consumers employed per fiscal year, with a 15% increase in employment outcomes from the prior fiscal year.
- 75% employment rate or greater for consumers on the autism spectrum receiving Life Mapping services
- 60% or greater employment rate for consumers with autism spectrum receiving VR services
- 15% annual increase in consumers served on the Autism Spectrum from Prior Year

Data Sources:

MRCIS/One MRC

Frequency of Evaluation:

Progress toward completing this goal will be evaluated quarterly and annually

Overall WIOA Combined State Plan Category:

Maximize labor force participation for adults and youths with disabilities

MRC Goal 10:

- As part of MRC's Diversity, Equity, Inclusion, and Accessibility (DEIA) efforts, continue to increase the diversity of consumers served and staff employed by MRC by increasing the

number and percentage of consumers and staff who are minorities, with a focus on African American, Hispanic, and Asian Consumers.

Key Performance Indicators:

- Increase in the number and percentage of African American, Hispanic, and Asian consumers served by MRC VR with a focus on offices who currently have less diversity
- Increase in the percentage of African American and Hispanic consumers placed into high wage occupational areas
- Increase in the number and percentage of minorities and individuals with disabilities employed by MRC, particularly for African American men

Target:

- Positive increase in the number and percentage of African American, Hispanic, and Asian consumers served by MRC VR with a focus on offices who currently have less diversity
- 10% or greater increase in the percentage of African American and Hispanic consumers placed into high wage occupational areas (defined as SOC Major Group codes 11, 13, 15, 17, 19, 21, 23, 25, 27, 29, and 47)
- Increase in the number and percentage of minorities and individuals with disabilities employed by MRC, particularly for African American men

Data Sources:

MRCIS, OneMRC, HR Data

Frequency of Evaluation:

Progress toward completing this goal will be evaluated quarterly and annually

Overall WIOA Combined State Plan Category:

Maximize labor force participation for adults and youths with disabilities

MRC Goal 11:

- Share job leads, data, labor market information and business relations strategies among WIOA Workforce Partners including MassHire to assist in promoting employment of job seekers in higher wage occupations and career pathways that meet the needs of the labor market in Massachusetts.

Key Performance Indicators:

- Create interactive dashboard of MRC job seekers based on vocational goals in the MRCIS system by Standard Occupational Code (SOC Code) compared to job placements and outcomes for job seekers by SOC Code. Incorporate *BLS Data on Jobs and Wages*.
- Research strategies for linking occupational code data with industry classification data.

Target:

- Complete reports and presentation of findings to agency leadership and the Job Placement Unit by the end of the program year
- Research strategies and develop recommendations for linking occupational code and industry classification data to guide job placement efforts, sector employment, and to assist with coordination of business services with WIOA partners

Data Sources:

MRCIS, OneMRC

Frequency of Evaluation:

Progress toward completing this goal will be evaluated annually

Overall WIOA Combined State Plan Category:

Maximize labor force participation for adults and youths with disabilities

(d) Evaluation and Reports of Progress: VR and Supported Employment Goals. For the most recently completed program year, provide an evaluation and report of progress for the goals or priorities, including progress on the strategies under each goal or priority, applicable to that program year. Sections 101(a)(15) and 101(a)(23) of the Rehabilitation Act require VR agencies to describe—

(1) Progress in achieving the goals and priorities identified for the VR and Supported Employment Programs;

The Massachusetts Rehabilitation Commission developed the following goals and priorities for the Vocational Rehabilitation and Supported Employment Programs for the previous Program Year as submitted in the approved VR services portion of the *Massachusetts PY2021-PY2024 Combined State Plan*. These goals were identified based on the *Comprehensive Statewide Needs Assessment* conducted in collaboration with the Statewide Rehabilitation Council (SRC) to survey the rehabilitation needs of individuals with disabilities. Additionally, these goals are based upon agency performance on the former RSA Standards and Indicators, recommendations, and input from the SRC, and input from MRC Senior Management. MRC will review progress on these goals on an annual basis with senior management. This is a report on progress on these goals based on PY2021 (FY2022), and PY2022 (FY2023) outcomes.

MRC's Data and Analytics team will use a cross-sectional approach and work closely with the senior management team to evaluate and assess progress towards the achievement of these goals and strategies, to identify lessons learned, next steps, and any corrective actions. MRC will develop reports, dashboards, and other tools to communicate progress down to all levels of staff and tie progress into local, regional, and individual progress goals to ensure transparency and accountability. Progress will also be reviewed with the SRC and other stakeholders

MRC Goal 1:

- Create career pathways for job seekers through increasing Employment Outcomes through placement, training, and Job Driven Trainings provided through MRC's Job Placement Unit, Employer Account Management System, and Annual Statewide Hiring Event. Continue to coordinate these business engagement efforts with WIOA partners as part of the overall MassHire Massachusetts workforce system.
- This aligns with Goal II of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Continue measuring Key Performance Indicators related to Successful Employment Outcomes (SEO's) including:

- Total number and percent of Successful Employment Outcomes for Vocational Rehabilitation Division and percentage change over the prior year's results
- Total number and percent of Successful Employment Outcomes achieved through the involvement of the MRC in the current fiscal year and percentage change over the prior year's results
- Total number and percent of Successful Employment Outcomes (Status 26 Closures) from consumers participating in MRC's annual Statewide Hiring Event in the current fiscal year and percentage change over the prior year's results

Target:

MRC's target goals:

- 3,200 Successful Employment Outcomes for MRC's Vocational Rehabilitation Division and 3% a positive percentage change over prior year results, with 15% of all VR eligible consumers served achieving a successful employment outcome
- Exceed 400 Successful Employment Outcomes, or 11% of all SEOs, for MRC's Job Placement Unit annually and a positive percentage change over prior year results
- 40% Successful Employment Outcomes for consumers participating in Statewide Hiring Event achieve annually, a 3% increase over prior year's outcomes

Data Sources:

MRCIS, Workgroup materials

Overall WIOA Combined State Plan Category:

Support business growth and sustainability elevating workforce services and developing diverse talent pipelines for businesses.

Evaluation of Progress: Goal 1:

Number and Percent of Successful Employment Outcomes for MRC's VR Division:

Goal number 1	FY22 number	FY22 percent	FY23 number	FY23 percent
Goal	3,200	15.0%	3,200	15.0%
Actual Outcome	3,023	11.0%	2,827	-6.0%

Number and Percent of Successful Employment Outcomes for MRC's Job Placement Unit:

Goal #1	FY22 #	FY22 %	FY23 #	FY23 %
Goal	400	11%	400	11%
Actual Outcome	597	19.7%	604	21.4%

Number and Percent of Successful Employment Outcomes (Status 26 Closures) from consumers participating in MRC's annual Statewide Hiring Event in the current fiscal year:

Goal #1	FY22%	FY23%
Goal	40.0%	40.0%
Actual Outcome	47/46%	54/58.0%

Comment on Progress:

MRC saw a rebound in referrals, consumers served, employment outcomes in FY2022 after decreases during the COVID-19 pandemic which impacted MRC consumers, providers, employers, and MRC staff. In FY2023 referrals and consumers served increased but employment outcomes decreased as MRC was impacted by significant VR counselor staff vacancies, progress which was made during the end of FY2023. MRC did meet its goals related to the number and percent of employment outcomes for MRC's hiring event, and its Job Placement Unit.

MRC Goal 2:

- Successfully implement a joint venture using the MRC Competitive Integrated Employment Service (CIES) program and the Adult Clinical Community Services (ACCS) program with the Department of Mental Health (DMH) to increase employment outcomes and create career pathways to better meet the needs of individuals with Behavioral Health needs utilizing the Integrated Resource Team (IRT) Model and the CIES Pay for Performance competitive employment model.

This aligns with Goal III of the *WIOA Combined State Plan*.

Key Performance Indicators:

MRC will evaluate the ACCS program based on Key Performance Indicators.

- MRC ACCS Job Seekers initiated engagement with ACCS Counselors
- MRC ACCS Job Seekers initiated engagement with CIES-ACCS providers
- MRC ACCS Job Seekers initiated engagement with internal Job Placement Services
- MRC ACCS Job Seekers having a completed IPE within 45 days from eligibility
- MRC ACCS Job Seekers initiating Placement Services from CIES-ACCS providers or MRC Job Placement Unit Staff as part of their ACCS services
- MRC ACCS Job Seekers receiving Benefits Planning as part of their MRC ACCS services
- MRC ACCS Job Seekers successfully being placed into employment through CIES-ACCS and MRC Job Placement Unit services
- MRC ACCS Job Seekers are successfully maintaining employment for 90 and 180 days through ACCS-CIES and Internal MRC Job Placement services

- MRC ACCS Job Seekers placed who are working an average and median of 20+ hours/week
- MRC ACCS Job Seekers placed receiving an average hourly wage of \$15/hour and a median hourly wage of \$14.25/hour

Target:

- MRC ACCS Counselors will serve 1,500 job seekers annually based on the caseload capacity goal of 50 per caseload, 60% or more of cases will have eligibility completed within 20 days of application
- 150 ACCS Job Seekers engaging with internal Job Placement Services annually
- 60% or more of MRC ACCS Job Seekers will have a completed IPE within 40 days from eligibility
- 65% or more of MRC ACCS Job Seekers initiating Placement Services from CIES-ACCS providers within the program year
- 70% or more of MRC ACCS Job Seekers with Social Security Insurance or Social Security Disability Insurance are receiving Benefits Planning as part of their MRC ACCS services
- 40% of MRC ACCS Job Seekers will be successfully being placed into employment through CIES-ACCS and MRC Job Placement Unit services
- 75% of Job Seekers will successfully maintaining employment after placement for 90 and 180 days through ACCS-CIES and Internal MRC Job Placement services
- MRC ACCS Job Seekers placed work an average and median of 25 hours/week
- MRC ACCS Job Seekers placed receive an average hourly wage of \$15/hour and a median hourly wage of \$14.25/hour

Data Sources:

MRCIS, CIES-ACCS Vendor Reports, MRC Satisfaction Survey

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment.

Evaluation of Progress: MRC Goal 2:

MRC ACCS Jobseekers initiated engagement with ACCS Counselors:

Goal #2	FY22 #	FY23 #
Goal	1500	1500
Actual Outcome	1943	2045

MRC ACCS Jobseekers initiated engagement with internal Job Placement Services:

Goal #2	FY22 #	FY23 #
Goal	150	150
Actual Outcome	161	190

MRC ACCS Jobseekers having completed eligibility in 20 days from application:

Goal #2	FY22 %	FY23 %
Goal	60.0%	60.0%
Actual Outcome	82.1%	85.2%

MRC ACCS Jobseekers having a completed IPE within 45 days from eligibility:

Goal #2	FY22 %	FY23 %
Goal	60.0%	60.0%
Actual Outcome	66.3%	66.4%

MRC ACCS Jobseekers initiating Placement Services from CIES-ACCS providers or MRC Job Placement Unit Staff as part of their ACCS services:

Goal #2	FY22 %	FY23%
Goal	65.0%	65.0%
Actual Outcome	45.6%	42.0%

MRC ACCS Jobseekers receiving Benefits Planning as part of their MRC ACCS services:

Goal #2	FY22 %	FY23 %
Goal	70.0%	70.0%
Actual Outcome	61.5%	66.4%

MRC ACCS Jobseekers successfully being placed into employment through CIES-ACCS and MRC Job Placement Unit services:

Goal #2	FY22 %	FY23%*
Goal	40.0%	20.0%*
Actual Outcome	31.8%	18.1%*

*Program data was tracked cumulatively prior to FY23 for the life of the project and shifted to fiscal year based in FY2023 as a baseline for ACCS was established.

MRC ACCS Job Seekers are successfully maintaining employment for 90 and 180 days through ACCS-CIES and Internal MRC Job Placement services:

Goal #2	FY22 %	FY23 %
Goal	75.0%	75.0%
Actual Outcome	68.8%	78.1%

MRC ACCS Job Seekers placed who are working an average and median of 20+ hours/week:

Goal #2	Average FY22 #	Median FY22 #	Average FY23	Median FY23 #
Goal	20+ Hours	20+ Hours	20+ Hours	20+ Hours
Actual Outcome	21	20	21	20

MRC ACCS Job Seekers placed receiving an average hourly wage of \$15/hour and a median hourly wage of \$14.25/hour:

Goal #2	Average FY22 #	Median FY22 #	Average FY23 #	Median FY23 #
Goal	\$15.00	\$14.25	\$15.00	\$14.25
Actual Outcome	\$15.86	\$14.75	\$16.89	\$15.00

80% of MRC ACCS Job Seekers satisfied with CIES-ACCS Services they received: (will be done in next 2 years:

Goal #2	FY20 %	FY21 %
Goal	80.0%	80.0%
Actual Outcome	N/A	92.0%

Comment on Progress:

MRC has successfully deployed its ACCS employment initiative in collaboration with the Department of Mental Health. MRC is now in the 5th year of this program. MRC continues to track performance on ACCS Key Performance Indicators monthly. In FY22 and FY23, MRC achieved its targets for most of its Key Performance Indicators for ACCS. These metrics are reviewed monthly and are used by agency leadership and local leadership to guide program changes. MRC has seen success in this program with placements, use of benefits planning, and moving individuals into eligibility and IPEs in a timely fashion, with a reduced front-end dropout rate compared to the regular VR program.

MRC Goal 3:

- Fully implement the redesign of the “Empower to Employ” program in collaboration with the Department of Transitional Assistance (DTA) to work to improve services and outcomes for individuals with disabilities receiving TANF support utilizing the Integrated Resource Team Model and the “Pay for Performance” competitive employment model. This project is part of MRC’s efforts with its WIOA partners to align and coordinate services amongst state partners.
- This aligns with Goal III of the *WIOA Combined State Plan*.

MRC will evaluate the “Empower to Employ” program using Key Performance Indicators with DTA and will update as required. Use data from Key Performance Indicators to develop targets during PY2022 and PY2023 based on PY2021 data.

Target:

- Increase services to allow 100 or more placements annually for the project
- Expand project sites from 5 to 8 by the end of PY2023
- Employed project participants will earn an average hourly wage of \$18.00 or more and work an average of 30 hours or more per week

Data Sources:

MRCIS

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Evaluation of Progress:

Goal #3	FY22 #	FY23 #
Goal	100	100
Actual Outcome	53	60

Hours:

Goal #3	FY22 #	FY23 #
Goal	30	30
Actual Outcome	31	29.7

Wage:

Goal #3	FY22 #	FY23 #
Goal	\$18.00	\$18.00
Actual Outcome	\$17.00	\$19.54

Comment on Progress:

MRC completed the expansion of the DTA Empower to Employ program from 3 to 5 offices in 2020 including a revised Interagency Service Agreement with DTA. The project was impacted by COVID-19 leading to reduced referrals between Spring 2020 and mid-2021, but referrals have increased significantly since Summer 2021 and placements and employment outcomes rebounded significantly in FY2022 and FY2023, with 60 placements in FY2023, an increase of 15% from FY2022. Finally, wages of those consumers employed were higher than the target, while hours worked was close to the target but higher than the overall hours worked average for MRC VR consumers in general. The employment rate for consumers was 59%.

MRC is working with DTA to expand the program beyond 5 sites.

MRC Goal 4:

- Maximize Employment Retention for MRC Consumers Employed at Exit from Vocational Rehabilitation at the Second Quarter after Exit
- This aligns with Goal III of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*

Key Performance Indicators:

Measure the following metric to gauge progress toward Goal 4:

- Employment Rate at the 2nd Quarter after Exit for MRC Consumers closed during the Current Program Year (Successful and Unsuccessful closures) based on Unemployment Insurance Wage Earnings

Target:

Target is 51% for negotiated standards from RSA which took effect in PY2022

Data Sources:

Closure Data from MRCIS, RSA—911 Report, Unemployment Insurance Quarterly Wage Data

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Performance Update:

Goal #4	FY22/PY21	FY23/PY22
Goal	Baseline	51.0%
Actual Outcome	47.9%	56.1%

Comment on Progress:

MRC achieved a 2nd quarter after exit employment rate of 47.9% for PY21/FY22, and 56.1% for PY22/FY23. RSA collected baseline data on this measure in PY21/FY22 and negotiated targets began in PY2022/FY2023. MRC exceeded its negotiated target for PY22/FY23 for this measure. MRC continues to focus on staff training to improve performance on the Common Measures.

MRC Goal 5:

- Maximize Employment Retention of competitive employment for MRC Consumers Employed at Exit from Vocational Rehabilitation at the Fourth Quarter after Exit and is based on the results of the *MRC Comprehensive Statewide Needs Assessment*.

This aligns with Goal III of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria to track progress of Goal 5:

- Employment Rate at the 4th Quarter after Exit for MRC Consumers closed during the Current Program Year (Successful and Unsuccessful closures) based on Unemployment Insurance Wage Earnings

Target:

Target is **48.7%** for negotiated standards from RSA which took effect in PY2022

Data Sources:

Closure Data from MRCIS, RSA-911 Report, Unemployment Insurance Quarterly Wage Data

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Performance Update:

Goal #5	FY22/PY21	FY23/PY22
Goal	Baseline	48.7%
Actual Outcome	51.2%	51.7%

Comment on Progress:

MRC achieved a 4th quarter after exit employment rate of 51.2% for PY21/FY22, and 51.7% for PY22/FY23. RSA collected baseline data on this measure in PY21/FY22 and negotiated targets began in PY2022/FY2023. MRC exceeded its negotiated target for PY22/FY23 for this measure. MRC continues to focus on staff training to improve performance on the Common Measures.

MRC Goal 6:

- Increase Median Quarterly Earnings for MRC Consumers Employed in competitive employment at Exit from Vocational Rehabilitation at the Second Quarter after Exit.
- This aligns with Goal III of the Combined Overall *WIOA State Plan* based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria to track progress of Goal 6:

- Median Quarterly Earnings at the 2nd Quarter after Exit for MRC Consumers closed during the Current Program Year (Successful and Unsuccessful closures) based on Unemployment Insurance Wage Earnings

Target:

Target is \$4,500 for negotiated standards from RSA which took effect during PY2022

Data Sources:

Closure Data from MRCIS, RSA-911 Report, Unemployment Insurance Quarterly Wage Data

Overall WIOA Combined State Plan Category:

Increase credentialing and job placement outcomes for individuals, including individuals with barriers to employment

Performance Update:

Goal #6	FY22/PY21	FY23/PY22
Goal	Baseline	\$4,500.00
Actual Outcome	\$5,499.00	\$5,304.32

Comment on Progress:

MRC achieved median quarterly earnings at the 2nd quarter after exit of \$5,499 for PY21/FY22, and \$5,304 for PY22/FY23. RSA collected baseline data on this measure in PY21/FY22 and negotiated targets began in PY2022/FY2023. MRC exceeded its negotiated target for PY22/FY23 for this measure. MRC continues to focus on staff training to improve performance on the Common Measures.

MRC Goal 7:

- Maximize the Number and Proportion of MRC Consumers with Recognized Secondary and/or Post-Secondary Credential Attainment during Participation in the MRC VR Program.
- This aligns with Goal III of the *Combined Overall WIOA State Plan* and based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria to track progress of Goal 7:

- Percent of MRC Consumers obtaining post-secondary education credentials and/or obtaining a secondary school diploma or equivalent during participation in the MRC VR Program (or up to 1 year after exit from program).

Target:

Establish baseline target based on currently available data and monitor progress. Pending establishment of negotiated standards from RSA/DOL which are expected for PY2022.

Data Sources:

Level of Education Data from MRCIS, RSA—911 quarterly reporting

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment.

Performance Update (RSA Capturing Baseline Data):

Goal #7	PY21/FY22		PY22/FY23
Goal	Baseline		20%
Actual Outcome	19.6%		26.5%

Comment on Progress:

MRC's performance increased significantly from 4.7% in PY19/FY20 to 26.5% in PY2022/FY2023. RSA collected baseline data on this measure in PY21/FY22 and negotiated targets began in PY2022/FY2023. MRC exceeded its negotiated target for PY22/FY23 for this measure. MRC has developed a series of trainings and technical assistance sessions for MRC staff on Credential Attainment and Measurable Skills Gains to assist in this area.

MRC Goal 8:

- Maximize the Percentage of MRC Consumers Enrolled in Education and Training Programs leading to a recognized credential or employment achieving measurable skills gains during the Program Year.
- This aligns with *Goal III* of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria in order to track progress of Goal 8:

- Percent of MRC Consumers enrolled in education and training programs leading to employment or a recognized post-secondary credential achieving measurable skills gains during the program year with documented progress divided by total number of consumers receiving services through an IPE in the program year (Status 12-22).

Target:

30% is the negotiated target from RSA for PY2021(FY2022), and 35% is the negotiated target for PY2022 (FY2023)

Data Sources:

Level of Education Data from MRCIS, RSA-911 quarterly reporting, WIOA Annual Report

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment.

Performance Update:

Goal #8	PY21/FY22	PY22/FY23
Goal	30%	35%
Actual Outcome	36.5%	39.9%

Comment on Progress:

The negotiated performance target for MRC for Measurable Skills Gains was 30% for FY22/PY21 and 35% in FY23/PY22. MRC's performance for Measurable Skills Gains has increased significantly from 7.3% in PY19/FY20 to 39.9% in PY22/FY23. MRC exceeded its skills gains targets for both PY21 and PY22. MRC has developed a series of trainings, actionable reports, and technical assistance sessions for MRC staff Measurable Skills Gains to assist in this area. This has led to an increase in performance.

MRC Goal 9:

- Provide Effective Services to Employers in the Commonwealth of Massachusetts to ensure retention rates of individuals placed in competitive employment.
- This aligns with *Goal 1* of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria to track progress of Goal 9:

- Employment retention rate with the same employer at 2nd and 4th quarter after exit for MRC consumers closed during the current program year (Status 26 Closures) based on Employer Tax ID (EIN) in Unemployment Insurance Wage Data.
- Number of repeat business customers (defined as a business where MRC places more than one job seeker during the program year)

Target:

- 400 or more repeat business customers annually where multiple job seekers are placed into employment. Pending establishment of negotiated standards from RSA/DOL which are expected for PY2024.
- Initial Target is 70% of job seekers retained at the same employer between the 2nd and 4th quarter after exit. Establish and refine target based on baseline of data and track progress on performance. Pending establishment of negotiated standards from RSA/DOL which are expected for PY2024.

Data Sources:

Status 26 Closure Data from MRCIS, RSA—911 Report, Unemployment Insurance Quarterly Wage Data, WIOA Annual Report

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment.

Employer Retention (RSA Capturing Baseline Data):

Goal #9	FY22/PY21	FY23/PY22
Goal	70.0%	70.0%
Actual Outcome (MRC)	65.0%	65.5%
Actual Outcome (State as a whole)	84.7%	84.5%

Repeat Business Customers (RSA Capturing Baseline Data):

Goal #9	FY22/PY21#	FY22/PY21%	FY23/PY22#	FY23/PY22%
Goal	400	N/A	400	N/A
Actual Outcome (MRC)	245	11.1%	215	10.8%
Actual Outcome (State as a whole)	N/A	28.9%	N/A	28.9%

Comment on Progress:

MRC and RSA continue to collect baseline data on Effectiveness of Serving Employers. The two pilot measures, employer retention and repeat business customers are measured on an annual basis. MRC has seen an employer retention rate between 65% and 70% and a repeat business customer rate of about 11%. This measure is reported as a state, and Massachusetts's Overall employer retention rate has been consistent between 84 and 85% and the repeat business customer rate has remained around 29%. The number of repeat business customers for MRC is lower than expected likely because of lower employment outcomes during COVID. MRC will continue to report baseline data through PY2023 to RSA.

MRC Goal 10:

- Maximize Successful Employment Outcomes for MRC Job Seekers for 90 Days or more and establish a new annual program outcome goal. Reset goal and target annually based on performance.

- This aligns with Goal III of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria in order to track progress of Goal 10:

- Total Sum and Percentage of Successful Employment Outcomes for MRC Consumers for the Current Program Year (Status 26 Closures).

Target:

- Achieve 3,200 or more successful employment outcomes in the program year.
- Achieve a Rehabilitation Rate (At case closure) of 55.8% statewide as a result of consumer attaining successful employment outcomes.

Data Sources:

Status 26 Closure Data from MRCIS, Monthly Key Performance Indicators Tracking Report

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Number and Percent of Successful Employment Outcomes for MRC's VR Division:

Goal #10	FY22 #	Employment Rate FY22	FY23#	Employment Rate FY23
Goal	3,200	55.8%	3,700	55.8%
Actual Outcome	3,023	49.1%	2,827	49.5%

Comment on Progress:

MRC saw a decrease in referrals, consumers served, and employment outcomes in FY2020 and FY2021 due to the COVID-19 pandemic which impacted MRC consumers, providers, employers, and MRC staff, leading MRC to have a decrease in employment outcomes. MRC saw a rebound in referrals, consumers served, employment outcomes in FY2022, but employment outcomes dropped again in FY2023 while consumers served, and referrals continued to increase. MRC was impacted by significant VR counselor staff vacancies, progress which was made during the end of FY2023, and turnover also affected MRC vendors. MRC's employment rate also was lower than the target. MRC is focusing on developing strategies to improve its employment rate going forward, such as looking at programs or projects which have higher employment rate and determining best practices which may be applicable to the entire VR program, and focusing on increased engagement, and attempting to reduce caseload size, and also developing strategies to place consumers in higher wage occupations.

MRC Goal 11:

- Maximize the number of Consumers Exiting the MRC VR Program whose Primary Source of Economic Support is from their own Employment Earnings.
- This aligns with Goal III of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment*.

Next Steps:

Evaluate the following criteria to track progress of Goal 11:

- Proportion of Individuals Successfully Closed in Status 26 in the current fiscal year with an RSA-911 Employment Status Code of Competitive Employment in MRCIS with hourly wages at or above minimum wage (the higher of either State or Federal Minimum Wage; currently Massachusetts is higher at \$12.75) whose Primary Source of Support at Closure is Personal Income (Code 1) minus the proportion of those consumers whose primary source of support at application was Personal Income (Code 1).

Target:

Ratio of 60% or more

Data Sources:

MRCIS, Monthly Key Performance Indicators Tracking Report

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Proportion of Individuals Successfully Closed in Status 26 in the current fiscal year with an RSA-911 Employment Status Code of Competitive Employment in MRCIS with hourly wages at or above minimum wage:

Goal #11	FY20	FY21
Goal	60.0%	60.0%
Actual Outcome	72.4%	70.5%

Comment on Progress:

This measure evaluates the percentage increase of consumers reporting they rely on income from employment as their primary source of support from time of application to closure. MRC exceeded its 60% target for both FY22 and FY23 by a wide margin.

MRC Goal 12:

- Fully implement the re-design of Pre-ETS Services to Eligible and Potentially Eligible students (Aged 14-22) Maximize the Number and Percentage of high school students receiving Pre-Employment Transition Services, including work-based learning experiences (Pre-ETS/Potentially Eligible) from MRC, either eligible or potentially eligible. Continue to coordinate Pre-ETS service delivery with partners and schools.
- This aligns with *Goal IV* of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment*.

Key Performance Indicators:

Evaluate the following criteria in order to track progress of Goal 12:

- Number of students (potentially eligible and eligible) receiving Pre-Employment Transition Services (Pre-ETS) from MRC and its contracted providers during the program year.

- Percent of students initiating services for each of the five Pre-ETS services (Work-Based Learning, Job Exploration Counseling, Counseling on Enrollment in Post-Secondary Education, Workplace Readiness Training, Self-Advocacy) from MRC and its contracted provider.
- Completion of an annual program evaluation report on Pre-ETS services provided by MRC and present findings to the SRC and MRC leadership.
- Explore ways to work with DESE and other partners to coordinate Pre-ETS services.

Target:

- Serve 3,000 or more students receiving one or more of the five Pre-ETS services during the program year.
- An average of 70% of students will initiate services for each of the five Pre-ETS services (Work-Based Learning, Job Exploration Counseling, Counseling on Enrollment in Post-Secondary Education, Workplace Readiness Training, Self-Advocacy) from MRC and its contracted providers during the program year.
- Completion of an annual program evaluation report on Pre-ETS services provided by MRC and present findings to the SRC and MRC leadership.
- Set up meetings with DESE and workforce partners to discuss coordination of Pre-ETS Services.

Data Sources:

MRCIS

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Number of students (potentially eligible and eligible) receiving Pre-Employment Transition Services (Pre-ETS) from MRC and its contracted providers during the program year:

Goal #12	FY22	FY23
Goal	3,000	3,000
Actual Outcome	3,472	3,600

Percent of students initiating services for each of the five Pre-ETS services:

Goal #12	FY22	FY23
Goal	60.0%	60.0%
Job Exploration Counseling	77.8%	78.3%
Work-Based Learning Experiences	85.6%	78.9%
Counseling on Enrollment Opportunities in Post-Secondary Education	60.5%	58.5%
Workplace Readiness Training	84.8%	86.5%
Self-Advocacy Instruction/Peer Mentoring	78.7%	73.0%

Completion of an annual program evaluation report on Pre-ETS services provided by MRC and present findings to the SRC and MRC leadership: In progress

Set up meetings with DESE and workforce partners to discuss coordination of Pre-ETS Services: In progress

Comment on Progress:

MRC met its target for consumers served in Pre-ETS services (both eligible and potentially eligible) in FY2022 and FY2023, with an increase in students receiving Pre-ETS from FY2021. There is a range in utilization of each of the 5 Pre-ETS services based on consumer needs, providers and counselors choose from the services based on the consumers interests and needs. Some services (Work-Based Learning, Workplace Readiness Services, and Job Exploration Counseling) are used more often than the other 2 Pre-ETS services (instruction in Self Advocacy and Counseling on Enrollment in Post-Secondary Education). MRC will continue to work with its providers to improve Pre-ETS services.

In terms of development of a Pre-ETS evaluation report, MRC has updated Pre-ETS reporting and is hoping to use this updated information to establish unit contract rates and to evaluate performance by developing Key Performance Indicators. MRC also holds meetings with DESE on Pre-ETS service coordination as needed. MRC continues to work with DESE and Workforce partners of our changing service delivery and coordinated efforts to serve our joint consumers. MRC plans to work with DESE to update its agreement for coordinating Pre-ETS delivery.

MRC Goal 13:

- Maximize the Number and Percentage of youth (defined as ages 14 through 24) consumers served by MRC completing education and training programs, including post-secondary education as part of MRC's efforts to coordinate services for youths with WIOA partners, including the MassHire workforce system.
- This aligns with Goal IV of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment*.

Key Performance Indicators:

Evaluate the following criteria to track progress of Goal 13:

- Number and Percent of Youth Aged 14 to 24 Completing Education and Training Programs. Measured by the flow of Youth Consumers moving from Status 18-Training and Education into Status 20-Job Ready or Status 22 -Job Placement during the month/fiscal year divided by the total number of youth consumers served in Status 18 Training and Education during the month/fiscal year.

Target:

At or above 200 or 3% of youth consumers per month completing training or education, annual total of 2250 or 16%

Data Sources:

MRCIS

Overall WIOA Combined State Plan Category:

Increase credentialing and job placement outcomes for individuals, including youth with barriers to employment.

Number and Percent of Youth Aged 14 to 24 Completing Education and Training Programs:

Goal #13	FY22 #	FY23%	FY23	FY23%
Goal	2,250	15.0%	2,250	15.0%
Actual Outcome	1,770	26.4%	1,971	31.3%

Comment on Progress:

MRC achieved its target for the proportion of youth consumers completing education and training programs in FY22 and FY23. MRC has begun a grant project known as NextGen Careers which focuses on employing consumers aged 18 to 30 in career pathways in high wage occupations such as STEM, through focusing on training and other pathways to employment.

MRC Goal 14:

- Create career pathways for job seekers through maximizing the Number of Successful Competitive Employment outcomes and the percent of Placements leading to Successful Employment Outcomes through MRC's Competitive Integrated Employment Services (CIES) programs in partnership with Community Rehabilitation Providers.
- This aligns with Goal II of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria to track progress of Goal 14:

- Total Number of 90-Day Successful Employment Outcomes from CIES Program; Total Number of CIES Successful Employment Outcomes divided by the total number of 30-Day Placements for the CIES Program, Percent of CIES consumers served achieving a placement.

Target:

- Exceed 850 Successful Employment Outcomes for CIES for the fiscal year and greater than 75% of CIES placements result in successful employment outcomes, and 60% or more of CIES consumers served during the year are placed into employment.
- Complete the redesign and deployment of *MRC CIES contracts* successfully through the RFP and annual monitoring and program evaluation process to provide CIES Pay for Performance services (*Annual Program Evaluation Report*).

Data Source:

MRC CIES Quarterly Cumulative Utilization Report and Annual Program Evaluation Report

Overall WIOA Combined State Plan Category:

Support business growth and sustainability elevating workforce services and developing diverse talent pipelines for businesses

30 Day Placements:

Goal #14	FY22	FY23
Goal	850	850
Actual Outcome	903	868

90 Day Placements:

Goal #14	FY22	FY23
Goal	600	600
Actual Outcome	719	672

Total Number of CIES Successful Employment Outcomes divided by the total number of 30-Day Placements for the CIES Program:

Goal #14	FY22	FY23
Goal	75.0%	75.0%
Actual Outcome	79.6%	77.4%

% of CIES consumers served achieving a placement:

Goal #14	FY22	FY23
Goal	60.0%	60.0%
Actual Outcome	30.4%	28.3%

Comment on Progress:

In FY2022 and FY2023, MRC achieved most of its goals associated with CIES, including successful employment outcomes, 30-day placements, and the percentage of placements who achieved a successful outcome. MRC saw the number of consumers served in CIES increase in FY2023 after dropping during the previous years, likely due to the COVID-19 pandemic. Placements and successful outcomes dropped from FY22 to FY23 but remained above the goal targets. MRC did fall short of its target for the percent of CIES consumers served achieving a placement in the fiscal year. MRC continues to closely monitor CIES program results and the Business Improvement Partners (BIPs) work closely with providers and are focusing on improving performance.

MRC has completed development of new Key Performance Indicators for CIES which are being rolled out in FY2024 and used by MRC's BIPs to focus on improving CIES outcomes. As part of MRC's development of a new case management system, a provider portal will be developed

which will assist with the CIES program by improving communication and flow of information between MRC and providers.

MRC Goal 15:

- Continue to provide consumers with an avenue to access employment and training opportunities through participation in the Donated Vehicle Program in partnership with Good News Garage and exploring other transportation partnerships.
- This aligns with *Goal III* of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria to track progress of Goal 15:

- Number of Consumers Participating in the Donated Vehicle Program who obtain a successful employment outcome or who enter training and education (*Status 18*) divided by the number of consumers participating in the Donated Vehicle Program during the current fiscal year.
- Research additional transportation partnerships to assist with transportation including programs related to bicycling.

Target:

- Greater than 90% of Consumers participating in the Donated Vehicle Program during the current fiscal year result in successful employment outcomes or enrollment in training or education (*Status 18*)
- Issue 100 vehicles per program year utilizing the RFR process, for a total of 400 over the 4-year period
- Number of individuals who may be employed as a result of this program
- 90% or greater satisfaction with the program
- Completion of research on additional transportation partnerships and presentation of a report to leadership and the SRC

Data Sources:

MRCIS

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment.

Number of Consumers Participating in the Donated Vehicle Program who obtain a successful employment outcome or who enter training and education (*Status 18*):

Goal #15	FY22	FY23
Goal	100	100
Actual Outcome	75	75

Percent of consumers receiving Good News Garage Donated Vehicle achieving employment or enrolled in education/training:

Goal #15	FY22	FY23
Goal	90%	90%
Actual Outcome	90.1%	90.3%

Completion of research on additional transportation partnerships and presentation of a report to leadership and the SRC: In Progress

90% or greater satisfaction with the program: In Progress

Comment on Progress:

MRC continues to operate the “Donated Vehicle Program” in partnership with Good News Garage. There were some impacts in terms of reduced deliveries due COVID but otherwise the program remains on track. About 90% of those receiving donated vehicles in FY2022 and FY2023 have achieved employment and/or have enrolled in education or training programs. Finally, MRC met with MassMobility prior to COVID-19 and have worked with MassMobility to update transportation resources linked to MRC’s website. MRC will continue to work on transportation efforts during the last two years of the *State Plan* period.

MRC Goal 16:

- Provide Quality Vocational Rehabilitation Services leading to increased successful employment outcomes to individuals with Autism. Coordinate services for individuals with Autism with partners.
- This aligns with *Goal III* of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria to track progress of Goal 16:

- Number of successful employment outcomes as defined by Status 26 closures for MRC consumers with a Primary and/or Secondary RSA Disability Cause Code of 08 and employment rate for these consumers.
- Number of consumers served on the Autism Spectrum

Target:

- Equal or greater to 175 consumers employed per program year
- Modernize the Life Skill mapping planning process for individuals with Autism through completion of an enhanced procurement/RFR to provide these services

- 75% employment rate or greater for consumers on the autism spectrum receiving Life Mapping services
- 55.8% or greater employment rate for consumers with autism spectrum receiving VR services

Data Sources:

MRCIS

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Number of successful employment outcomes as defined by Status 26 closures for MRC consumers with a Primary and/or Secondary RSA Disability Cause Code of 08 and employment rate for these consumers:

Goal #16	FY22	FY23
Goal	200	200
Actual Outcome	436	428

Employment Rate:

Goal #16	FY22	FY23
Goal	55.8%	55.8%
Actual Outcome	51.5%	56.6%

Number of consumers served on the Autism Spectrum:

Goal #16	FY22	FY23
Goal	N/A	N/A
Actual Outcome	3089	3,187

Employment rate for consumers on the autism spectrum receiving Life Mapping services: 94% actual, 75% goal

Modernize the Life Skill mapping planning process for individuals with Autism through completion of an enhanced procurement/RFR to provide these services: In progress

Comment on Progress:

MRC continues to focus on services provided to individuals on the Autism spectrum. MRC continues to see an increase in both the number and percentage of consumers served with Autism. The number of consumers served with Autism increased in FY22 and FY23. MRC also exceeded its target for the number of consumers with Autism achieving employment outcomes by a wide margin. The number of consumers with Autism employed dropped slightly in FY23 from FY22, but the rate of decrease was much lower than that for all consumers employed in FY2023. The employment rate of consumers with Autism was lower than the goal for FY2022 but above the goal for FY2023, both years were above the rate for MRC overall for FY22 and

FY23. Finally, consumers receiving Life Mapping services in FY2023 had a 94% employment rate. MRC continues to work closely with the Autism/Asperger Network (AANE) on the provision of Life Mapping and other supports to consumers with Autism. MRC also works closely with the Autism Commission on provision of services, as well as to increase and improve outreach efforts to consumers served with Autism. Finally, through its NextGen Careers project, MRC is targeting outreach and service efforts to targeted populations, including individuals with Autism. Individuals with Autism make up 35% of the total of young adults served in the NextGen program.

MRC Goal 17:

- Continued Outreach to the Asian community to identify strategies for serving this underserved population.
- This aligns with *Goal III* of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

- Develop and implement a new consumer engagement program which will include coordination of outreach services to community organizations in areas with underserved populations
- Increase in the number and percent of Asian consumers served by MRC

Target:

- Develop and implement a new consumer engagement program which will include coordination of outreach services to community organizations in areas with underserved populations.
- Increase in the number and percent of Asian consumers served by MRC from prior year.

Data Sources:

Program evaluation program data, MRCIS, SRC engagement work plan

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Evaluation of Progress:

Increase in the number and percent of Asian consumers served by MRC from prior year: MRC was steady in terms of the proportion of Asian consumers served between FY2021 and FY2023, with a 0.1% increase from 3.8% in FY2021 to 3.9% in FY2022, but then a decrease back to 3.6% in FY2023.

Develop and implement a new consumer engagement program which will include coordination of outreach services to community organizations in areas with underserved populations: Completed

Comment on Progress:

MRC has rolled out its office of Consumer and Family Engagement as of 2020. This new office continues to focus on developing multiple platforms to listen and learn from MRC Consumers and has held two summits for MRC consumers in the past two years. MRC is also working with its DEIA Council, Employee Resource Groups, and has established a workgroup of Disability Inclusion Leaders and Family Inclusion Ambassadors.

While MRC saw a slight increase in the proportion of Asian consumers served, the change was not significant. The agency is committed to increase the number of Asian consumers and all consumers of diverse backgrounds. MRC continues to work on efforts to improve outreach to all communities, including the Asian community, to ensure equity in access to MRC VR services. MRC will continue to work with its Employee Resource Groups, Bilingual Committee, the SRC, its DEIA council, the Office of Consumer and Family Engagement, Disability Inclusion Leaders, Family Inclusion Ambassadors, and other stakeholders in this area.

MRC Goal 18:

- Research Best Practices Models to create career pathways and increase employment of Individuals with Disabilities based on recommendations provided by the SRC Executive Committee.
- This aligns with *Goal III* of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Completion of research of best practices, models, or capstone projects for the development of new programs intended to provide enhanced training and job placement for individuals with disabilities for presentation to the leadership team and the SRC.

Target:

Completion of research and completion of a report by the end of the program year for presentation to MRC Leadership and the SRC

Data Sources:

CSAVR, Google/Electronic Reference Libraries

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Evaluation of Progress:

Completion of research of best practices, models, or capstone projects for the development of new programs intended to provide enhanced training and job placement for individuals with disabilities for presentation to the leadership team and the SRC: In Process

Comment on Progress: In 2021, MRC applied for and successfully received a RSA innovation grant to evaluate a new model to serve individuals with disabilities in Vocational Rehabilitation, focusing on young adults. Known as NextGen, the goal will be to provide a new model of coordinated service approaches to develop career pathways in STEM and other high wage careers leading to increased employment and wages. The program is being evaluated by ForHealth Consulting at UMASS Chan Medical School. The program recently completed its 2nd year. Progress will continue to be reported as individuals continue to be served and obtain employment outcomes. Over 400 individuals have been enrolled in services to date.

MRC Goal 19:

- Expand the use of occupational goal information from MRC job seekers to inform job placement efforts. Share occupational data and coordinate sharing of labor market information with WIOA Workforce Partners including MassHire.
- This aligns with Goal V of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment*.

Key Performance Indicators:

- Develop a report of MRC job seekers based on vocational goals in the MRCIS system by Standard Occupational Code (SOC Code) compared to job placements and outcomes for job seekers by SOC Code.
- Track placements and occupational goals by SOC code and SOC category.
- Research strategies for linking occupational code data with industry classification data.
- Revamp labor market information reports for MRC staff.

Target:

- Complete reports and presentation of findings to agency leadership and the Job Placement Unit by the end of the program year.
- Research strategies and develop recommendations for linking occupational code and industry classification data to guide job placement efforts, sector employment, and to assist with coordination of business services with WIOA partners.
- Complete new labor market report templates for MRC staff.

Data Sources:

MRCIS

Overall WIOA Combined State Plan Category:

Ensure Massachusetts has a world-class service delivery system by integrating use of modern tools and techniques

Evaluation of Progress:

Complete reports and presentation of findings to agency leadership and the Job Placement Unit by the end of the program year: In Progress

Research strategies and develop recommendations for linking occupational code and industry classification data to guide job placement efforts, sector employment, and to assist with coordination of business services with WIOA partners: In Progress

Complete new labor market report templates for MRC staff: In Progress

Comment on Progress:

MRC has developed a report of the types of occupation and occupational areas of vocational goals for job seekers compared to job placements and outcomes for job seekers by occupation and occupational area (using Federal Standard Occupational Codes)

This is currently done manually and sent to the Job Placement Unit. MRC is currently working on a Tableau Dashboard on occupational goals compared to employment outcome and will be working to automate this report as part of the OneMRC Case Management system development so it can be accessed with real time data by all staff on a regular basis.

MRC is examining linking its occupational code data with industry classification data with the development of the OneMRC system by considering the addition of NAICS codes to the new system as it is developed. MRC also receives labor market information from MassHire and will continue to focus on development of additional labor market resources as part of its data modernization efforts.

MRC Goal 20:

- Research and develop ways to conduct outreach to college students and other groups to increase awareness of MRC services and research additional resources to assist MRC consumers who are in post-secondary education programs.
- This aligns with *Goal V* of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Completion of research into ways MRC can outreach to college students to increase awareness of MRC services. Develop additional resources and programs that may assist MRC consumers in post-secondary education program. Present findings to the leadership team and the SRC.

Target:

Completion of research into ways MRC can outreach to college students to increase awareness of MRC services. Develop additional resources and programs that may assist MRC consumers in post-secondary education program. Develop a report and present findings to the leadership team and the SRC.

Data Sources:

Google/Electronic Reference Libraries

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Evaluation of Progress:

Completion of Research: In progress

Comment on Progress:

- MRC will conduct a workgroup to discuss practices in outreach to college students.
- MRC will present findings to leadership and the SRC once these have been identified.

MRC Goal 21:

- Implementation of a new MRC MassHire Training and Placement Collaborative Program where MRC is coordinating training services for MRC Job Seekers through the MassHire Career Center network, as part of efforts to coordinate service delivery across WIOA workforce partners in Massachusetts.
- This aligns with Goals I and III of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment*.

Key Performance Indicators:

- MRC will develop Key Performance Indicators for this project with MassHire. Use data from Key Performance Indicators to establish a baseline and develop targets during PY2020 and PY2021 based on PY2019 data.
- Completion of an annual program evaluation report on the MassHire Training and Placement Collaborative Program and present findings to the SRC, MRC leadership, and WIOA partners.

Target:

- Completion of Key Performance Indicators, Establishment of baseline data and develop targets by PY2021 based on project data.
- Completion of an annual program evaluation report on the MassHire Training and Placement Collaborative Program and complete presentation of findings to the SRC, MRC leadership, and WIOA partners.

Data Sources:

MRCIS, Reports from MassHire

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment

Completion of Key Performance Indicators, establishment of baseline data and develop targets by PY2021 based on project data: Completed

Completion of an annual program evaluation report on the MassHire Training and Placement Collaborative Program and complete presentation of findings to the SRC, MRC leadership, and WIOA partners: Completed

Comment on Progress:

MRC has analyzed the first 3 years of the MassHire Training program, for FY2020 to FY2022. A total of 413 consumers were served, and those served achieved an employment rate of 58.8%, higher than the overall VR program. Those completing MassHire trainings had an employment rate of 68.8%. 64.7% of those consumers completing MassHire trainings obtained a job related to the trainings. The average wage for consumers employed was \$19.97, with an average hours worked of 32.33. Median hours worked was 40. This suggests that the trainings lead to full-time jobs for most participating consumers and that outliers from lower-hour and part-time jobs are bringing the average down. An evaluation presentation has been created and provided to MRC VR leaderships and MRC has developed KPI for the MassHire training programs using baseline data is currently being collected in collaboration with MassHire. Identified KPI consist of individual served, individual completing trainings, individuals successfully employed, individuals employed who obtain a job related to the trainings, employment rate, employment rate for those completing trainings, wages, hours, and occupational types.

MRC will work with MassHire to collect additional data in a format to be matched against MRC's case management system and evaluate the progress of the program and will present findings to leadership going forward.

MRC Goal 22:

- Provide Quality Vocational Rehabilitation Services leading to increased successful employment outcomes to individuals with behavioral health needs. Coordinate services for individuals with Behavioral Health Needs^[1] with partners.
- This aligns with Goal III of the *WIOA Combined State Plan* and is based on the results of the *MRC Comprehensive Statewide Needs Assessment* and the *SRC Recommendations*.

Key Performance Indicators:

Evaluate the following criteria in to track progress of Goal 22:

- Number of successful employment outcomes as defined by Status 26 closures for MRC consumers with a Primary and/or Secondary RSA Disability Code of 18 and employment rate for these consumers (excluding those participating in the MRC DMH ACCS program)
- Number of consumers served with a Disability Code of 18 during the program year

Target:

- Equal or greater to 600 consumers employed per program year (excluding those consumers participating in the MRC DMH ACCS program)
- Employment rate of 55.8% or greater for consumers with Disability Code 18 receiving MRC VR services (excluding consumers participating in the MRC DMH ACCS program)

Data Sources:

MRCIS

Overall WIOA Combined State Plan Category:

Expand capacity of the workforce system to accelerate employment, especially for those with challenges to employment.

[1] Behavioral Health Needs are defined by RSA within *Policy Directive RSA-PD-16-04 as Disability Code 18: Psychosocial Impairments* (e.g., interpersonal and behavioral impairments, difficulty coping)

Evaluation of Progress:

Number of successful employment outcomes as defined by Status 26 closures for MRC consumers with a Primary and/or Secondary RSA Disability Code of 18 and employment rate for these consumers (excluding those participating in the MRC DMH ACCS program):

Goal #22	FY22 #	Employment Rate	FY23 #	Employment Rate
Goal	700	55.8%	700	55.8%
Actual Outcome	1296	45.8%	1222	46.4%

Comment on Progress:

MRC exceeded its goals in FY2022 and FY2023 for the number of successful employment outcomes for individuals with mental health needs, however fell short of its goal for the employment rate for these consumers. MRC is working on strategies to improve its employment rate for all individuals served, particularly those with mental health needs as this is the largest group of consumers served by MRC. MRC has found that programs which increase engagement with consumers often lead to higher employment rates, MRC will be focusing on strategies to improve engagement.

MRC Supported Employment Program FY2023/PY2022 Goal Achievement:

Consumers Served PY2021/FY2022: Goal: 475, Actual: 450

Employment Outcomes: Goal: 88, Actual: 100

Consumers Served PY2022/FY2023: Goal: 475, Actual: 440

Employment Outcomes, PY2021/FY2022: Goal: 88, Actual: 67

MRC's strategy for provision and delivery of Supported Employment Services utilizes a network of community providers. MRC reviews progress on supported employment cases with staff and providers on a quarterly basis to assess progress and make any necessary corrective actions to ensure consumers are receiving quality services.

B. Describe the factors that impeded the achievement of the goals and priorities

The following is an evaluation of the extent to which the MRC program goals described in the previously approved VR services portion of the *Unified State Plan* for the most recently completed program year, were not achieved.

MRC achieved most of its goals and priorities and/or is making progress on its goals as stated in the approved VR services section of the *Massachusetts Combined State Plan for PY2020-PY2024* except for portions of goals 1, 2, 3, 10, 14, 15, 17, and 22. The impact of the COVID-19

pandemic which had an impact on MRC, its providers, schools, employer, and consumers. MRC saw a drop in referrals and consumers served during this period which impacted the number of employment outcomes and impacted several *State Plan* goals. MRC has seen referrals, eligibilities, and consumers serve rebound in FY2022, and employment outcomes increased in FY2022 but then fell somewhat in FY2023. MRC has also been dealing with vacancies and turnover in staff which accelerated at the end of the pandemic which impacted employment outcomes in FY2023. This has also affected MRC contracted service providers. Progress has been made filling these vacancies coming into FY2024 and it is expected with the continued increase in consumer applicants and filling of staff vacancies, and by focusing on increasing the employment rate, that the number of employment outcomes will begin to rebound. MRC is also developing strategies to increase its employment rate through looking at best practices from services and programs with higher employment rates and is evaluating the NextGen Careers project from VR for additional strategies. MRC is also focusing on job driven trainings and other strategies to drive consumers towards career pathways and occupations with advancement opportunities and increasing the number of consumers placed into occupations with higher wages and advancement opportunities.

MRC will continue to closely evaluate the progress towards its goals in the new State Plan period and make appropriate corrections as needed and present progress to leadership, the SRC, and stakeholders.

(2) Performance on the performance accountability indicators under section 116 of WIOA for the most recently completed program year, reflecting actual and negotiated levels of performance. Explain any discrepancies in the actual and negotiated levels; and

MRC has considered WIOA Performance measures and its performance on these measures in its goals and priorities. MRC will continue to report data to RSA on these measures for PY2024 and further program years as specified in the final requirements for the *WIOA Combined/Unified State Plan*. In PY2022, MRC exceeded all its negotiated goals for the *WIOA Common Performance Measures*.

MRC's Analytics and Quality Assurance department will continue to analyze the data as it becomes available and create a report for management on the common measures. Information on the Common Measures is reported to VR and agency leadership and is presented regularly by MRC Analytics and Quality Assurance staff to MRC counselors and Area Offices. A data dashboard of this information will be developed as part of MRC's initiative to create a new case management system to push data down on these performance measures to staff at area offices and to counselors as applicable.

MRC has developed a series of trainings on WIOA Common Performance Measures, focusing on Measurable Skills Gains and Credential Attainment. A detailed Job Aid, training video, FAQ document, and ongoing technical assistance sessions have been developed and are provided to MRC counselors, supervisors, and managers. Monthly reports have been developed and are sent to VR staff to assist with performance in these areas.

MASSACHUSETTS REHABILITATION COMMISSION

MASSACHUSETTS GENERAL VOCATIONAL REHABILITATION THREE-YEAR PERFORMANCE

WIOA Common Performance Measures	FY21/PY20		FY22/PY21		FY23/PY22	
	Goal	Actual	Goal	Actual	Goal	Actual
Employment Rate at 2nd Quarter After Exit	Baseline	50.8%	Baseline	47.9%	51%	56.1%
Employment Rate at 4th Quarter After Exit	Baseline	48.4%	Baseline	51.2%	48.7%	51.7%
Median Quarterly Earnings at 2nd Quarter After Exit	Baseline	\$4,444.22	Baseline	\$5,499	\$4,500	\$5,304
Credential Attainment Rate	Baseline	16.9%	Baseline	19.6%	20%	26.5%
Measurable Skills Gains	20%	21%	30%	36.5%	35%	39.9%
Effectiveness of Serving Employers –Retention from 2 nd to 4th Quarter After Exit (MA)	Baseline	80%	Baseline	84.7%	Baseline	84.5%
Effectiveness of Serving Employers –Repeat Business Customers (MA)	Baseline	29%	Baseline	28.9%	Baseline	28.9%

(3) The use of funds reserved for innovation and expansion activities (sections 101(a)(18) and 101(a)(23) of the Rehabilitation Act) (e.g., SRC, SILC).

The Massachusetts Rehabilitation Commission reserves and uses a portion of the funds allotted to the Commission under section 110 of the Rehabilitation Act for the development and implementation of innovative approaches to expand and improve the provision of vocational rehabilitation services to individuals with disabilities under this *State Plan*, particularly individuals with the most significant disabilities. Consistent with the findings of the Comprehensive Statewide Needs Assessment and goals and priorities identified in conjunction with the State Rehabilitation Council, the Commission uses funds to support innovation and expansion activities to address the needs of individuals with disabilities, primarily individuals with the most significant disabilities, and to promote increased employment rates and labor force participation rates for people with disabilities across Massachusetts.

In Program Year 2022, MRC assigned \$1,724,800.03 to Innovation and Expansion activities, and to date in Program Year 2023, MRC has assigned \$2,727,351.38 to Innovation and Expansion activities. A summary of activities undertaken over the past two program years include:

1. On-The-Job Trainings and Job-Driven Trainings with Employer Partners: MRC continues to expand Job-Driven Trainings (JDT) and On-the-Job (OJT) training and evaluations.

MRC has found that many consumers who participate in an OJT or Job-Driven training obtain employment with the OJT or JDT. Other participants are able to obtain employment elsewhere as a result of their participation in the OJT or JDT because they gained recent work experience and/or developed job-specific skills. MRC has created numerous job- driven training programs with a variety of employers supporting employment opportunities in growth industries.

2. MRC - Department of Transitional Assistance Empower to Employ Project: MRC and the Department of Transitional Assistance have developed a project known as Empower to Employ designed to increase employment outcomes for individuals with disabilities receiving TANF benefits. The partner agencies use a jointly-funded model of client engagement and intensive co-case management to provide individualized and meaningful services. Through this collaborative effort, DTA and MRC are utilizing an Integrated Resource Team (IRT) approach to facilitate recruitment (pre-engagement), engagement, service delivery and placement.
3. MRC-Department of Mental Health Employment Initiative: MRC coordinates employment services for individuals with mental health needs served by the Department of Mental Health's Adult Clinical Community Services (ACCS) program in collaboration with DMH and its vendors. The new MRC/DMH Employment Initiative is designed to build an integrated employment framework that inspires and engages innovation to ensure full employment for people with mental health needs at the same rate of employment as the general population. The focus of this initiative is on individuals served by DMH through Adult Community Clinical Services (ACCS). These individuals are being referred to MRC for Vocational Rehabilitation Employment Services. To serve these individuals, MRC is using an Integrated Resource Team approach, where partner agencies and supports come together to craft and jointly own a Job Seeker's employment goal, to coordinate wrap-around services and ongoing collaboration and communication. MRC has hired dedicated staff with funding through the ISA to work with ACCS referrals. These counselors will have smaller caseloads and will work with MRC CIES providers, DMH providers, DMH, and other MRC staff to rapidly engage with consumers, develop a plan for employment, and coordinate services designed to assist these consumers in achieving successful employment outcomes.
4. IT enhancements to modernize the agency's technology and to improve the effectiveness and efficiency of services. These include a provider portal to assist in reporting and tracking the provision of Pre-ETS services to potentially eligible consumers, to enhance tracking and reporting on internal job placement services, to develop a consumer portal for information and referral, and to develop a paperless system using Electronic Data Management.
5. MRC's Job Placement Unit operates an annual Federal Hiring Event in partnership with MCB, other workforce partners, and the Office of Federal Contract Compliance

Programs (OFCCP) in their Boston and Hartford offices. The Hiring Event assists consumers with securing competitive employment comparable with their interests and abilities. MRC prepares consumers to interview for available jobs with employers participating in the event. It focuses on direct job placement with participating employers and is not simply a career fair. In 2023, MRC completed its 11th annual Hiring Event. Since 2013, Over 610 individuals have been successfully employed across the Commonwealth through participating in this annual one-day event. The aggregate annual wages of all successfully employed consumers through the hiring event since 2013 is approximately \$14.2 million. Consumers have been employed in a variety of occupations ranging from office and administrative support, health care, protective service, human services, and management occupations, amongst others.

6. **Transportation:** MRC is working diligently to address transportation barriers faced by its consumers. MRC has updated transportation resource fact sheets on its website and makes them available to consumers at its Area Office. MRC hired a transportation coordinator through its Transition Pathway Services (TPS) grant and MRC is documenting lessons learned and best practices now that the grant period has ended. One major achievement has been that MRC consumers are now automatically eligible for the Transition Access Pass (TAP) program. This program offers half-fare rides on all Regional Transit Authorities across the Commonwealth. MRC also works with the Executive Office of Health and Human Service Transportation office on transportation for consumers and operates an innovative car donation program to assist individuals in accessing worksites. MRC has a benefits planning grant to assist consumer in their efforts to go to work, which can include the Plan for Achieving Self Supports (PASS) and impairment-related work expenses as incentives for an individual to go to work. MRC also uses IRS Section 44 as a strategy to assist consumers with Transportation needs. MRC will continue to work with transportation agencies to explore other creative transportation options for consumers. MRC also met with MassMobility and worked to update transportation resources and linked them to the MRC website to ensure this information is available to MRC consumers.
7. **Employment of Individuals with Disabilities in State Jobs:** MRC places numerous individuals with disabilities into state government jobs each year, including at MRC. MRC has a diverse workforce with a high percentage of individuals with disabilities in the workforce. We have a key contact with the state's Human Resources Division to facilitate employment for consumers in state jobs, including the provision of On-The-Job training and internship opportunities with state and federal agencies. The Commonwealth also participates in MRC's annual hiring event to provide information to consumers on available state job opportunities, including how to apply.
8. **Learn to Earn:** MRC is engaged with the Learn to Earn initiative. Learn to Earn is a comprehensive approach to providing unemployed and underemployed individuals who

are receiving assistance from public benefit programs with the supports, skills, and credentials they need to gain and retain employment in occupations for which employers have persistent demand. Learn to Earn Programs will help participants set and achieve goals necessary for employment and sustained economic stability, such as maintaining and growing family net resources and minimizing the real or perceived potential impact of increased earned income on benefit receipt, including improving coordination across benefit programs and reducing benefit cliff effects. As part of this program, MRC is providing information on benefits counseling.

9. Work-Based Learning Experiences for Students with Disabilities to assist them in preparing for future employment and educational experiences.
10. Apprenticeships: MRC will utilize available apprenticeship resources, including the ODEP guide to expand apprenticeship, to provide apprenticeship opportunities for individuals with disabilities across the Commonwealth. As an example, MRC participates in the Merit Apprenticeship Program. Additionally, MRC has obtained a copy of the ODEP guide on apprenticeships. MRC will also work with the Career Centers on providing apprenticeship opportunities for consumers. MRC has leased space at the career centers and has staff dedicated to the career centers to make available the range of career services from Career Centers for MRC consumers.
11. MRC has developed an Interagency Service Agreement (ISA) with the Massachusetts Department of Public Health to develop training programs to assist individuals with disabilities to complete training programs and obtain credentials to be substance abuse counselors. This has been identified as a growth area and a higher compensated profession in the Commonwealth of Massachusetts.
12. MRC has developed a partnership with the Career Centers known as the MassHire Training and Placement Collaborative Program where MRC is coordinating training services for MRC Job Seekers through the MassHire Career Center network, as part of efforts to coordinate service delivery across WIOA workforce partners in Massachusetts.
13. MRC partners and contracts with The Asperger/Autism Network's (AANE) Life Management Assistance Program (LifeMAP). This program provides practical assistance to individuals on the Autism Spectrum and other related conditions. LifeMAP provides intensive, highly individualized coaching by professionals with expertise in both Autism Spectrum Disorder, and specific content areas. Coaches focus on identifying and overcoming the specific barriers each client faces so that the clients can increase their levels of independence towards reaching their full potential. MRC has also renewed its MOU with the Department of Developmental Services which includes coordination of services to individuals on the Autism spectrum.

(e) Supported Employment Services, Distribution of Title VI Funds, and Arrangements and Cooperative Agreements for the Provision of Supported Employment Services.

(1) Acceptance of title VI funds:

(A) VR agency requests to receive title VI funds. (YES)

(B) VR agency does NOT elect to receive title VI funds and understands that supported employment services must still be provided under title I (NO)

The Massachusetts Rehabilitation Commission elects to utilize Title VI funds to assist in provision of supported employment services

(2) If the VR agency has elected to receive title VI funds, Section 606(b)(3) of the Rehabilitation Act requires VR agencies to include specific goals and priorities with respect to the distribution of title VI funds received under section 603 of the Rehabilitation Act for the provision of supported employment services. Describe the use of title VI funds and how they will be used in meeting the goals and priorities of the Supported Employment program.

The Massachusetts Rehabilitation Commission elects to utilize Title VI funds. MRC will be utilizing Title I funds and Title VI B funds to provide Supported Employment Services. MRC has developed a contingency plan to use Title I funds to provide Supported Employment Services if Title VI B are not appropriated in the federal budget. MRC's Supported Employment Services are provided under the notation that rates, fees, and expenditures are subject to applicable Commonwealth of Massachusetts statutory, regulatory, and related requirements governing purchases of services and goods. Such parameters of the Commonwealth of Massachusetts govern, amongst other things, methods of procurement. Further, all providers of supported employment services need to qualify through the Commonwealth of Massachusetts' interagency contractual process. To the maximum extent possible, the Commission and the Commonwealth utilizes procurement methods which facilitate the provision of services in a manner that affords individuals meaningful choices among the entities (providers) that deliver services.

MRC will use 50% of Title VI B funds as represented by the Supported Employment-B award to provide supported employment services to youth based on their needs and services outlined in their individualized plan for employment. Services will be provided to assist youth with the most significant disabilities in choosing, obtaining, and maintaining competitive employment based on their interest, abilities, and skills. Title VI funds will only be used to provide supported employment services to youth once they are placed in a job. Title I funds will be used to provide supported employment services to youth prior to job placement. These funds will also be used to provide extended services to up to 4 years for youths with the most significant disabilities until the youth reaches age 25 to assist them in maintaining and advancing in competitive employment. As a contingency plan if Title VI B Supported Employment funds are

not appropriated, MRC will also use Title I funds and State funding to provide supported employment services to youth with the most significant disabilities based on their needs.

MRC establishes consumer need for this service on a fiscal year basis and then funds Supported Employment services for those consumers in that specific geographic location to help inform staffing and service delivery needs. In PY23, MRC has a goal to provide Supported Employment Services to 350 consumers across the state through its area offices and its Competitive Integrated Employment Services (CIES) procurement. MRC will prioritize Supported Employment services to consumers with Mental Health needs, Developmental Disabilities, Traumatic Brain Injuries, Autism, and severe learning disabilities, amongst other needs.

The MRC Supported Employment Program provides Supported Employment Services to consumers statewide through its Area Offices and through a network of qualified community rehabilitation providers. MRC has developed links with the local school system for transitioning youth, and other state agencies such as the Department of Developmental Services and the Department of Mental Health (DMH), through its clubhouse programs and through collaboration with DMH on Adult Community Clinical Services (ACCS).

The Massachusetts Rehabilitation Commission continues to promote collaboration with stakeholders regarding supported employment services and extended services. This is also evidenced in the number of joint funded programs that have been established. Some examples of these collaborative programs are joint funding of services for individuals with intellectual disabilities between the MRC and the Developmental Disability Services (DDS); for individuals with mental health needs between MRC and the Department of Mental Health (DMH); for individuals who have traumatic brain injuries between the Statewide Head Injury Program (SHIP) of the Massachusetts Rehabilitation Commission; and the Massachusetts Commission for the Blind.

MRC has *Memorandums of Understanding (MOU)* with DDS and the Department of Mental Health (DMH). These MOUs are designed to improve collaboration, coordination, and utilization of joint agency resources in ensuring quality service delivery and long term supports that result in competitive/supported employment outcomes for mutual consumers. This collaboration is at the Regional and local levels. Through developing a process for conducting joint-service planning, local liaisons/training and joint service planning, all consumers and specifically transition aged individuals be better served and able to achieve successful employment outcomes.

(3) Supported employment services may be provided with title 1 or title VI funds following placement of individuals with the most significant disabilities in employment. In accordance with section 101(a)(22) and section 606(b)(3) of the Rehabilitation Act, describe the quality, scope, and extent of supported employment services to be provided to individuals with the most significant disabilities, including youth with the most significant disabilities; and the timing of transition to extended services.

The Massachusetts Rehabilitation Commission has established a process to provide quality Supported Employment services to individuals with the most significant disabilities, for adults and youth. MRC will be utilizing Title I funds and Title VI B funds to provide Supported Employment services. MRC provides a range of supported employment services to assist consumers in their efforts to choose, obtain and maintain complete employment opportunities based on their abilities, skills, interests and needs as outlined in their Individualized Plan for Employment. MRC provides Supported Employment services through its area office network. MRC provides supported employment services to youths and adults with disabilities based on their needs and services outlined in their individualized plan for employment.

MRC utilizes a network of Qualified Community Rehabilitation Providers through MRC's Competitive Integrated Employment Services (CIES) program to purchase and provide Supported Employment services to consumers. These programs, located throughout the state, serve persons with an array of significant disabilities including mental health, autism, deaf/severely hearing impaired, severely physically disabled, traumatic brain injured and dual diagnosed persons with intellectual disabilities and mental health, and other individuals with disabilities. MRC adjusted the CIES model based on lessons learned and input from its staff, CRP partners, and other stakeholders. These adjustments are designed to improve the effectiveness and efficiency of CIES services for MRC consumers, including supported employment services. MRC also incorporated peer support and flexible supports into the CIES procurement which should benefit consumers receiving supported employment services through MRC.

In addition, MRC works with its Workforce Partners and continues to expand partnerships with other state agencies such as the Department of Developmental Services and the Department of Mental Health to provide wrap-around supports and comparable benefits to assist individuals receiving supported employment services in obtaining and maintaining employment.

(4) Sections 101(a)(22) and 606(b)(4) of the Rehabilitation Act require the VR agency to describe efforts to identify and arrange, including entering into cooperative agreements, with other State agencies and other appropriate entities in order to provide supported employment services. The description must include extended services, as applicable, to individuals with the most significant disabilities, including the provision of extended services to youth with the most significant disabilities in accordance with 34 CFR 363.4(a) and 34 CFR 361.5(c)(19)(v).

The Massachusetts Rehabilitation Commission has developed a process to provide extended ongoing employment support services to assist individuals with disabilities in maintaining and advancing in their careers utilizing state funding, comparable benefits, and natural supports for long-term extended support services after federal funds can no longer be used. Paid extended supports are provided through a network of qualified community rehabilitation providers as part of MRC's Competitive Integrated Employment Services (CIES) program as well as partnering with other state agencies such as the Department of Mental Health and the Department of Developmental Services.

The Massachusetts Rehabilitation Commission works with other human service agencies to identify and secure funding and comparable benefits for extended supports for individuals in Supported Employment, including youth with the most significant disabilities. Funding for extended services is available from several sources, contingent upon the consumer's disability, eligibility, and the resources available to each state agency. This service delivery system is currently in place enabling state agencies to cost share the appropriate services needed for consumers to choose, find, and maintain meaningful competitive supported employment. With the implementation of this initiative to partner with other human service agencies, we have seen an increase in the availability of resources for extended services. However, the available funding is administered at local levels and each situation handled individually.

Sources of funding include:

Massachusetts Rehabilitation Commission (State Revenue), Department of Developmental Services, Department of Mental Health, Medicaid Waiver Supported Employment Services, MRC Statewide Head Injury Program, Massachusetts Commission for the Deaf and Hard-of-Hearing, Social Security Administration Work Incentives, as well as Natural Supports from employers and other comparable benefits.

The Massachusetts Rehabilitation Commission continues to promote collaboration with stakeholders regarding supported employment services and extended services. This is also evidenced in the number of jointly funded programs that have developed. Some examples of these collaborative programs are services jointly funded for individuals with intellectual disabilities between the MRC and the Developmental Disability Services (DDS); for expansion of partnership between MRC and the Department of Mental Health (DMH) for individuals with mental health needs; for individuals who have traumatic brain injuries in conjunction with the Statewide Head Injury Program (SHIP) of the Massachusetts Rehabilitation Commission; and for the Massachusetts Commission for the Blind.

Funding for extended long-term support services is available from several sources depending on the nature of the consumer's disability and the resources available. Sources include:

1. Massachusetts Rehabilitation Commission State Ongoing Support Funding
2. *IRS Section 44*
3. Department of Mental Health
4. Department of Developmental Services
5. Massachusetts Rehabilitation Commission Statewide Head Injury Program
6. Social Security Work Incentives/PASS Plan
7. Impairment-Related Work Expenses
8. Natural Supports from Employers
9. Medicaid Waiver Supported Employment Services
10. Other Comparable Benefits

Transition to extended services begins once the individual achieves job stability for 90 days or more. As part of the Individualized Plan for Employment (IPE), supported employment cases are identified and the need and funding source for extended support services is identified as part of the IPE. For youths, Title VI-B reserve funds will be used for extended supports. After job stability is achieved for this period of time, the MRC VR case may be closed successfully when the consumer and counselor mutually agree to the closure of the case. After case closure, post-employment services can be provided as needed, or the case can be moved to state-funded ongoing support resources with contracted service providers, or extended supports provided through other agency funding, or employer-based or other natural supports as described above.

(f) Annual Estimates. Sections 101(a)(15) and 101(a)(23) of the Rehabilitation Act require all VR agencies to annually conduct a full assessment of their resources and ability to serve all eligible individuals before the start of the Federal fiscal year. In accordance with 34 CFR § 361.29(b), annual estimates must include the following projections:

(1) Estimates for next Federal fiscal year— A) VR Program; and

1. The number of individuals in the State who are eligible for services

The *U.S. Census* estimates as of July 1, 2022, that the population of Massachusetts was 6,981,974, a decrease of 0.7% from the 2020 census.

The *U.S. Census* reported the following demographic profile for the residents of the state:

79.4% were White alone; 9.5% were Black or African American alone; 2.7% were multi-racial; 7.7% were Asian alone; 7.1% were Some Other Race alone; 0.5% were American Indian and Alaska Native alone; 0.1% were Native Hawaiian and Other Pacific Islander alone. 13.1% were of Hispanic ethnicity (any race).

MRC analyzed statewide data from the Massachusetts Department of Elementary and Secondary Education (DESE)

(<https://profiles.doe.mass.edu/statereport/selectedpopulations.aspx>)

According to DESE data, there are 179,095 students with disabilities (consisting of 19.4% of all high school students statewide) enrolled in public high schools in Massachusetts as of December 1, 2022, all who may be potentially eligible for VR services and/or who may benefit from Pre-ETS services.

In 2022, there were 6,915,688 individuals living in the community in Massachusetts, of which 808,474 were persons with disabilities: a prevalence rate of 11.7%. This is a 0.2% increase from 2020. Of these, 390,447 individuals with disabilities are aged 18 to 64 and

living in the community. This is a projection based on available data from the 2020 Disability Statistics Compendium. Thus, our projection is that approximately 500,000 individuals may be eligible for MRC VR services. <https://disabilitycompendium.org/sites/default/files/user-uploads/Accessible-Annual%20Report%20---%202023%20---%20Accessible.pdf>

https://disabilitycompendium.org/sites/default/files/user-uploads/2023_Annual_Disability_Statistics_Supplement_ALL.pdf

Please note that this is the most up to date information available as of when the *State Plan* update was developed.

FFY2024 Annual Estimates: It is estimated that the Massachusetts Rehabilitation Commission will provide services with funds provided under Part B of Title I of the Act as follows during FFY2024:

During FFY2024/PY2023, MRC estimates we will serve 24,000 consumers, excluding potentially eligible consumers receiving Pre-Employment Transition Services. MRC is not operating under an order of selection and all categories are open for services in this time.

Priority Category (if applicable)	Number of Individuals Eligible for Services	Number of Eligible Individuals Expected to Receive Services under VR Program	Estimated Costs of Services using Title I Funds	Number of Eligible Individuals Not Receiving Services (if applicable)
N/A	24,000	24,000	\$65,192,353	N/A

1. New individuals to be provided services to determine eligibility (new applicants):
Projection: 9,000
2. New individuals to be provided services to determine vocational rehabilitation needs (new individuals determined eligible): Projection: 8,000
3. New Individuals to be provided vocational rehabilitation services necessary to render them employable consistent with an approved Individual Plan for Employment (IPE) and subsequent amendments (New IPEs): Projection: 6,500
4. New Individuals with most significant disabilities to be provided vocational rehabilitation services necessary to render them employable consistent with an approved Individual Plan for Employment (IPE) and subsequent amendments (New IPEs, Most Significantly Disabled): Projection: 2,800
5. Total Eligible Individuals to be provided vocational rehabilitation services (new and existing): Projection: 24,000

FFY2025:

FFY2025 Annual Estimates: It is estimated that the Massachusetts Rehabilitation Commission will provide services with funds provided under Part B of Title I of the Act as follows during FFY2024

During FFY2025/PY2024, MRC estimates we will serve 24,000 consumers, excluding potentially eligible consumers receiving Pre-Employment Transition Services. MRC is not operating under an order of selection and all categories are open for services in this time.

Priority Category (if applicable)	Number of Individuals Eligible for Services	Number of Eligible Individuals Expected to Receive Services under VR Program	Estimated Costs of Services using Title I Funds	Number of Eligible Individuals Not Receiving Services (if applicable)
N/A	24,000	24,000	\$51,000,000	N/A

1. New individuals to be provided services to determine eligibility (new applicants):
Projection: 10,500
2. New individuals to be provided services to determine vocational rehabilitation needs (new individuals determined eligible): Projection: 9,000
3. New Individuals to be provided vocational rehabilitation services necessary to render them employable consistent with an approved *Individual Plan for Employment (IPE)* and subsequent amendments (New *IPEs*): Projection: 7,500
4. New Individuals with most significant disabilities to be provided vocational rehabilitation services necessary to render them employable consistent with an approved *Individual Plan for Employment (IPE)* and subsequent amendments (New *IPEs*, Most Significantly Disabled): Projection: 3,200
5. Total Eligible Individuals to be provided vocational rehabilitation services (new and existing): Projection: 25,000

(B) Supported Employment Program.

Priority Category (if applicable)	Number of Individuals Eligible for Services	Number of Eligible Individuals Expected to Receive Services under Supported Employment Program	Costs of Services using Title I and Title VI Funds	Number of Eligible Individuals Not Receiving Services (if applicable)
N/A	350	350	\$1,000,000	N/A

MRC will be utilizing Title I and Title VI B funds to provide Supported Employment services. It is estimated that the Massachusetts Rehabilitation Commission will provide Supported

Employment services with Title I and Title VI funds to 350 individuals annually in both FFY2024 and FFY2025.

(g) Order of Selection.

The VR agency is not implementing an order of selection and all eligible individuals will be served. (YES)

[check box] The VR agency is implementing an order of selection with one or more categories closed (NO)

*** VR agencies may maintain an order of selection policy and priority of eligible individuals without implementing or continuing to implement an order of selection.**

MRC has an *Order of Selection (OOS) policy* and procedure but currently is not operating under an *Order of Selection*. All categories are open for services and all individuals eligible for VR services are receiving such services.

MRC utilizes a fiscal forecasting process to determine whether to implement its *OOS policy* and to determine if funding is available to serve all eligible individuals and to determine if categories need to be opened or closed. MRC obtains input, guidance, and an official recommendation from the Statewide Rehabilitation Council as part of the process to determine whether an *OOS* needs to be established or modified.

A functional assessment is provided to all individuals determined eligible to determine their priority category assignment in accordance with 34 CFR 361.42. The definition of the priority categories and the order to be followed if MRC were to implement an *OOS* is outlined in MRC's *OOS policy VR 19-01*.

Pursuant to section 101(a)(5) of the Rehabilitation Act, this description must be amended when the VR agency determines, based on the annual estimates described in description (f), that VR services cannot be provided to all eligible individuals with disabilities in the State who apply for and are determined eligible for services.

(1) For VR agencies that have defined priority categories describe—

(A) The justification for the order;

MRC has an *Order of Selection (OOS) policy* and procedure but currently is not operating under an *Order of Selection*. All categories are open for services and all individuals eligible for VR services are receiving such services.

- (B) **The order (priority categories) to be followed in selecting eligible individuals to be provided VR services ensuring that individuals with the most significant disabilities are selected for services before all other individuals with disabilities; and**

MRC has an *Order of Selection (OOS) policy and procedure* but currently is not operating under an *Order of Selection*. All categories are open for services and all individuals eligible for VR services are receiving such services.

- (C) **The VR agency's goals for serving individuals in each priority category, including how the agency will assist eligible individuals assigned to closed priority categories with information and referral, the method in which the VR agency will manage waiting lists, and the projected timelines for opening priority categories. NOTE: Priority categories are considered open when all individuals in the priority category may be served.**

MRC has an *Order of Selection (OOS) policy and procedure* but currently is not operating under an *Order of Selection*. All categories are open for services and all individuals eligible for VR services are receiving such services.

- (2) **Has the VR agency elected to serve eligible individuals outside of the order of selection who require specific services or equipment to maintain employment?**
[check box] Yes

In its *OOS Policy and Procedure*, MRC has elected to take the option of provision of services to VR eligible individuals who require specific services or equipment to maintain employment who are at risk of losing their job. MRC has an *Order of Selection (OOS) policy and procedure* but currently is not operating under an *Order of Selection*. All categories are open for services and all individuals eligible for VR services are receiving such services. If MRC were to implement an *OOS*, individuals requiring services to maintain employment, upon provision of appropriate documentation, will be placed into services.

(h) Waiver of Statewideness. The *State Plan* shall be in effect in all political subdivisions of the State, however, the Commissioner of the Rehabilitation Services Administration (Commissioner) may waive compliance with this requirement in accordance with section 101(a)(4) of the Rehabilitation Act and the implementing regulations in 34 CFR 361.26. If the VR agency is requesting a waiver of statewideness or has a previously approved waiver of statewideness, describe the types of services and the local entities providing such services under the waiver of statewideness and how the agency has complied with the requirements in 34 CFR 361.26. If the VR agency is not requesting or does not have an approved waiver of statewideness, please indicate "not applicable."

Not Applicable - MRC has not requested a waiver of Statewideness.

(i) Comprehensive System of Personnel Development. In accordance with the requirements in section 101(a)(7) of the Rehabilitation Act, the VR agency must develop and maintain annually a description (consistent with the purposes of the Rehabilitation Act) of the VR agency's comprehensive system of personnel development, which shall include a description of the procedures and activities the VR agency will undertake to ensure it has an adequate supply of qualified State rehabilitation professionals and paraprofessionals that provides the following:

(1) Analysis of current personnel and projected personnel needs including—

(A) The number and type of personnel that are employed by the VR agency in the provision of vocational rehabilitation services, including ratios of qualified vocational rehabilitation counselors to clients;

The MRC tracks and maintains staffing information by classification, vacancy rate, and information to determine its staffing level based on the distribution of new referrals and active clients. This information is updated regularly.

As of October 2023, The Commission currently employs 304 individuals in the VR Program. Of this number, 190 are VR counselors and first line supervisors, 29 are managers, 19 are internal job placement team staff, and 65 are program, technical, or administrative staff. 31.9% of MRC staff are from minority backgrounds, 74% are women, 12.5% are persons with disabilities, and 3% are Veterans.

Most counselors carry "general caseloads" consisting of consumers representing all disability populations; a smaller number of counselors carry "specialty" caseloads consisting primarily of consumers with the same/similar disabilities (i.e., psychiatric disabilities), including dedicated counselors for the Deaf and Hard-of-Hearing and for particular language groups. MRC actively served 21,357 consumers in SFY2023/PY2022. The average caseload size per VR counselor was 113.4 as of October 2023, when factoring out vacant caseloads that is 130.6.

(B) The number of personnel currently needed by the VR agency to provide VR services, broken down by personnel category; and

MRC monitors the number of active consumers and its available resources on an ongoing basis and sets its staffing pattern based on these factors. The MRC will act as needed to ensure sufficient staff to serve the caseload based on the projected number of consumers with active individualized employment plans (IPEs) based on available resources and review from the leadership team.

MRC projects it will need to maintain a staffing level of 324 FTEs in the VR Program. Of this number, 198 are VR counselor and first line supervisors, 19 placement unit staff, 32 managers, and 75 are program, technical, or administrative staff.

(C) Projections of the number of personnel, broken down by personnel category, who will be needed by the VR agency to provide VR services in 5 years based on projections of the number of individuals to be served, including individuals with significant disabilities, the number of personnel expected to retire or leave the field, and other relevant factors.

Over the next 5 years, MRC will continue to monitor the number of active consumers and its available resources and will set its staffing pattern based on these factors. The MRC will act as needed to ensure sufficient staff to serve the caseload based on the projected number of consumers with active individualized employment plans (IPEs) based on available resources and review from the leadership team.

MRC continues to experience turnover as a result of retirements and resignations of counselors, supervisors, and managers. This accelerated during the COVID-19 pandemic but is stabilizing. It appears this trend will begin to decrease as we move into the mid-late 2020s. MRC is expecting approximately 40-50 counselors, supervisors, and administrative staff in the VR program to retire or leave the agency over the next five years. MRC has developed strategies to backfill critical positions across the VR program and is working on strategies to develop a more mobile workforce with new technology to improve the effectiveness and efficiency of our staff and the employment experience of consumers.

MRC projects it will need to maintain a staffing level of 366 FTEs in the VR Program. Of this number, 230 are VR counselors and first line supervisors, 19 placement unit staff, 32 managers and 85 are program, technical, or administrative staff.

Personnel Category	Number of Personnel Employed	Number of Personnel Currently Needed	Projected Number of Personnel Needed in 5 Years
VR Counselors and Supervisors	190	198	230
Placement Staff	19	19	19
Management	29	32	32
Program, Technical, and Administrative Staff	65	75	85

(D) Ratio of qualified VR counselors to clients:

Based on the 21,357 consumers served during FY2023, and the current number of qualified VR counselors employed by MRC, **the current ratio of qualified VR counselors to clients is 112:4**

(E) Projected number of individuals to be served in 5 years:

MRC projects to serve 26,000 clients in 5 years. We have seen an increase in referrals, so we expect a slight increase in the total amount of individuals we serve over the course of the next years due to the increased flow of referrals. Additionally, MRC's efforts to rebrand and market its services are also expected to increase the number of individuals to be served over the next 5 years to the projected level of 26,000.

(2) Data and information on personnel preparation and development, recruitment and retention, and staff development, including the following:

(A) A list of the institutions of higher education in the State that are preparing VR professionals, by type of program; the number of students enrolled at each of those institutions, broken down by type of program; and the number of students who graduated during the prior year from each of those institutions with certification or licensure, or with the credentials for certification or licensure, broken down by the personnel category for which they have received, or have the credentials to receive, certification or licensure.

In a given academic year, upwards of 100 undergraduate students and 125 graduate students are enrolled in degree programs either full-time or part-time as rehabilitation "majors" at the colleges and universities referenced.

Each year, upwards of 50 undergraduate students are awarded the bachelor's degree and upwards of 60 graduate-level students graduate with credentials to qualify for certification by the Commission on Rehabilitation Counselor Certification and/or licensure by the Commonwealth of Massachusetts broken down by institution as follows:

Institute of Higher Education	Type of Program	No. of Students Enrolled	No. of Prior Year Graduates
Salve Regina University	Rehabilitation Counseling	5 graduate / 5 undergraduate	5 graduate/ 5 undergraduate
Assumption College	Rehabilitation Counseling	50 graduate/ 40 undergraduate	25 graduate/20 undergraduate
University of Massachusetts Boston	Rehabilitation Counseling	35 graduate / 30 undergraduate	15 graduate / 18 undergraduate
Springfield College	Rehabilitation Counseling	30 graduate / 25 undergraduate	12 graduate/ 10 undergraduate

(B) The VR agency's plan for recruitment, preparation, and retention of qualified personnel, which addresses the current and projected needs for qualified personnel; and the coordination and facilitation of efforts between the VR agency and institutions of higher education and professional associations to recruit, prepare, and retain personnel who are qualified, including personnel from minority backgrounds and personnel who are individuals with disabilities.

MRC operates with a learning and participatory performance culture with an emphasis on high performance teams, individual performance/contribution/impact, and engaging in activities to promote and support a program/division/agency. In addition, MRC is an agency committed to diversity, equity, inclusion, and racial equity, as well as innovation and transformation and change, and creating a culture of agility, excellence, and belonging. These principles are built into MRC's plan for recruitment and retention of staff. MRC continues to develop new initiatives such as a Diversity, Equity, Inclusion, and Accessibility (DEIA) Council to focus on efforts related to equity and inclusion, including staff recruitment.

The MRC's plan for recruitment includes meeting with representatives from the Commission's Learning and Development Team. MRC communicates with officials of the CORE accredited rehabilitation departments and officials responsible for minority outreach at Assumption College, Springfield College, Salve Regina, and the University of Massachusetts at Boston regarding pertinent information on the preparation of rehabilitation professionals and for the specific purpose of recruiting graduates for employment in the federal/state VR Program. Special emphasis will be given to students with disabilities and students from minority backgrounds. Additionally, MRC staff also are available to address rehabilitation students providing them with an overview of the agency and the public rehabilitation program. Internal job postings are automatically sent to these institutions informing them of job openings and procedures to apply. A number of rehabilitation students have completed their field placement and practicum experience within MRC affording them a realistic view of work at MRC.

MRC also maintains relationships with nearly 40 minority referral sources and routinely forwards all job postings to them thereby encouraging application for employment at all job levels from persons from minority backgrounds. MRC has developed a program to reach out to educational organizations to recruit professionals reflective of our communities with a focus on diversity, equity, inclusion, and accessibility (DEIA). Position openings can be advertised in newspapers (i.e., Boston Globe, Boston Herald, Worcester Telegram and Gazette) and posted internally and externally on the Internet in a variety of locations (MASSCareers, Indeed, Monster, SimplyHired, and LinkedIn).

(C) Description of staff development policies, procedures, and activities that ensure all personnel employed by the VR agency receive appropriate and adequate training and continuing education for professionals and paraprofessionals:

- i. Particularly with respect to assessment, vocational counseling, job placement, and rehabilitation technology, including training implemented in coordination with entities carrying out State programs under section 4 of the Assistive Technology Act of 1998; and
- ii. Procedures for the acquisition and dissemination of significant knowledge from research and other sources to VR agency professionals and paraprofessionals and for providing training regarding the amendments to the Rehabilitation Act made by the Workforce Innovation and Opportunity Act.

MRC has a system of staff development for its Vocational Rehabilitation Division. supports a wide variety of training and development programs for all staff through a comprehensive training program run by its Learning and Community Engagement Department. MRC's trainings continue to focus on compliance with WIOA regulations and guidelines, and on working with our workforce partners and other disability agencies to provide coordinated services. MRC will continue to provide training to its staff to enhance their skills, professional development, and enhanced practices to best serve consumer needs.

A series of workshops and seminars have been and will continue to be planned in the following priority areas:

- Vocational Rehabilitation best practices, trainings related to the agency's initiatives with the Department of Mental Health and the Department of Transitional Assistance, substance abuse training in partnership with the Department of Public Health, diversity trainings through the Human Resources Division, trainings on Measurable Skills Gains and other WIOA performance measures, Pre-Employment Transition Services, quality employment outcomes, leadership development and succession training, transportation options, transitional planning, serving consumers on the autism spectrum, and programs under Section 4 of the Assistive Technology Act of 1998 (operated by MRC), training on fiscal agility, and training on the agency's integrated eligibility project known as MRC Connect.
- MRC also continues to offer ongoing professional development for VR counselors, managers, and supervisors. These trainings address 21st century labor trends, high growth occupations and skills that are in

demand, trainings on job accommodations and employment tax credits, amongst other topics.

- MRC has issued a RFR to work with a vendor on improving VR relations, which includes development of a new Training Curriculum to be used to train VR staff on best practices. And to develop, in partnership with agency staff and stakeholders, a comprehensive VR specific new Vocational Rehabilitation counselor training.

The new curriculum will be based on:

- Research of existing (national and state) Vocational Rehabilitation Counselor training and curricula and make recommendations that align with service best practice and federal/state regulations.
- Review of existing MRC trainings and policies relevant to vocational rehabilitation and associated learning and development tools and resources.
- Gathering feedback from MRC staff and stakeholders to inform training and curricula.
 - Development Phase:
 - Work in collaboration with MRC's Department of Learning and Community Engagement, Department of Vocational Rehabilitation and Workforce Development on content and delivery mechanisms.
 - Develop multi-model curricula and recommend training modalities. Example topics of interest could include:
 - Maximizing use of MRC systems (e.g., case management, services application portal) in effective service delivery.
 - Writing and documenting effective case notes.
 - Developing a strength-based Individualized Employment Plan and building effective rapport with service recipients.
 - Implications of integrated eligibility/expedited enrollment on consumer engagement.
 - Outreach and engagement of underserved populations and formerly incarcerated consumers.
 - Considerations:
 - Training will consider the unique needs of MRC's specialty workforce (e.g., Deaf and Hard-of-Hearing Counselors, Bilingual Counselors).
 - Training will emphasize strategies for supporting a hybrid workforce and hybrid service delivery model.

- Specialty-curricula will touch on best practices for supporting the unique needs of service recipients with mental health conditions, substance use, diverse communities (e.g., BIPOC, LGBTQ+).

MRC also makes trainings available in cooperation with staff labor unions on professional development, including computer software training and online training via LinkedIn's Learning Online training site and the state's MassAchieve training site.

MRC has also worked with the state HR Division's Center for Staff Development to develop a certificate program for aspiring managers and supervisors where staff works to gain leadership and management skills guided by a supervisor or manager serving as a mentor. Also, project management and leadership certificates are available through this program. Finally, MRC operates a regular new staff orientation to assist with educating and retaining staff.

B. Procedures for the Acquisition and Dissemination of Significant Knowledge from Research and Other Sources to Designated State Unit Professionals and Paraprofessionals.

MRC has the following procedures for the acquisition and dissemination of significant knowledge from research and other sources to designated State unit professionals and paraprofessionals.

The Commission acquires and routinely disseminates rehabilitation materials and research to staff such as the latest publications from the Institute on Rehabilitation on Issues, training materials from the Research and Training Centers, training guides and resource materials produced by recipients of RSA grants, and products from the National Clearinghouse of Rehabilitation Training Materials, as well as information and knowledge from RSA VR Technical Assistance centers such as the American Indian Vocational Rehabilitation Training and Technical Assistance Center (AIVRTTAC), National Technical Assistance Center on Transition: The Collaborative (NTACT:C), Vocational Rehabilitation Technical Assistance Center for Quality Employment (VRTAC-QE), Vocational Rehabilitation Assistance Center for Quality Management (VRTAC-QM). MRC also disseminates materials and information from the National Rehabilitation Association, the Association of People Supporting Employment First, Explore VR, and other sources. These information and materials are also discussed and utilized in training and staff development meetings and webinars. MRC has also coordinated and consulted with WINTAC and NTACT on training efforts.

(3) Description of VR agency policies and procedures for the establishment and maintenance of personnel standards consistent with section 101(a)(7)(B) to ensure that VR agency professional and paraprofessional personnel are adequately trained and prepared, including—

(A) Standards that are consistent with any national or State-approved or -recognized certification, licensing, registration, or other comparable requirements that apply to the profession or discipline in which such personnel are providing VR services; and

The Massachusetts Rehabilitation Commission is utilizing a state approved certified Human Resource Division classification standard, to recruit and employ qualified counseling staff as required by WIOA. There are three levels of classifications in the Qualified Vocational Rehabilitation Counselor (QVRC) series. Incumbents of classifications in this series administer functional, skills analysis and other vocational assessment tests; review and analyze diagnostic information through tests, records, interviews, and observations; develop, implement, and monitor Individualized Plans for Employment (IPEs); and provide job placement assistance and job development skills.

The basic purpose of this work is to evaluate individuals with physical, emotional, or other impairments or multi-impairments to determine eligibility for vocational rehabilitation services under the Workforce Investment and Opportunity Act. QVRC- I is an entry-level position. QVRC- II is the fully competent level classification in the series and QVRC III is a supervisory level position. The following is the state certified Human Resource Division classification standard to recruit and employ qualified counseling staff as required by WIOA. MRC also has slightly different postings for QVRC IIs for Job Placement Specialists and for Mental Health Specialty QVRC for the MRC-DMH Employment Initiative. MRC also has 3 levels of Employment Service Specialist (ESS) positions, Employment Service Specialist I who assists with outreach to employers to identify job opportunities for MRC consumers, ESS-II which focuses on job placement services to be provided to MRC consumers. and ESS-III which are supervisory level positions for MRC's Job Placement unit.

In January 2024, Governor Healey issued Executive Order 627 which requires state agencies to remove educational requirements from state job requirements and focus on experience and skills for job entrance requirements. MRC has also reached an agreement with staff to change position requirements. As a result of the Executive Order and agreement, MRC is creating a new state skills requirement standard and removing educational requirements from its Qualified Vocational Rehabilitation Counselor and Employment Service Specialist class positions as well as all other job classes within the agency. This change will assist MRC in ensuring a skilled 21st century workforce that will be best positioned to assist individuals with disabilities in achieving their career goals. This will also provide increased opportunity to individuals with disabilities in obtaining employment with MRC by removing educational barriers and focus instead on skills and experience.

1. QUALIFIED VOCATIONAL REHABILITATION COUNSELOR I:

Distinguishing Characteristics: This is the entry-level classification in this series. Employees in this series evaluate individuals including transition age students with physical, emotional, or other impairments or multi-impairments to determine eligibility for vocational rehabilitation services under the Workforce Innovation and Opportunity Act of 2014; administer residual functional capacities assessments, interest tests, aptitude tests, transferable skills analysis and other vocational assessment tests; review and analyze diagnostic information through tests, records, interviews, and observations; develop, implement, and monitor Individualized Plans for Employment through onsite visits and conferences in a manner that allows the eligible consumer the opportunity to exercise Informed Choice in employment outcomes; recommend the purchase of equipment and materials including Assistive Technology for program and/or service use; provide service and skills training in individual and group settings; provide job placement assistance and job development; and confer with public and private organizations including other professionals, specialists, agency staff, employers, and others to promote and market agency programs and to review the suitability of client services, and related work as required.

MRC is a learning and participatory performance culture with an emphasis on high performance teams, individual performance/contribution/impact, and engaging in activities to promote and support a program/division/agency (e.g., committee membership, Roadmap workgroup membership, presenting at Town Halls, achieving learning and performance goals). In addition, MRC is an agency committed to diversity, equity, inclusion, and racial equity, as well as innovation, transformation, and change, and creating a culture of agility, excellence, and belonging.

Supervision Received: Employees of positions at this level receive direct supervision from a Qualified Vocational Rehabilitation Counselor III or other employees of a higher grade, who provides training and guidance on procedures and policy, assigns work and reviews performance through conferences and reports for effectiveness and conformance with agency policy.

Incumbents may receive general direction from other work units to ensure accuracy and compliance with funding requirements.

Supervision Exercised: Incumbents may provide functional guidance to new employees.

Functions Performed: At this level, Incumbents are expected to perform one or more of the following:

- a. Employees meet with consumers who have physical, emotional, psychiatric, or other disability, on a regular basis to conduct intake interviews and vocational counseling and guidance sessions, work collaboratively developing the IPE, and provide assistance with securing competitive employment.
- b. Employees determine eligibility within agency time standard for vocational rehabilitation services through the review and analysis of records, tests, observation, and interviews to determine occupational interests and abilities and the extent of

disability and eligibility for agency services and programs to make recommendations to meet consumer needs. Complete standardized functional assessment to determine need and priority of service category.

- c. Explain and answer inquiries of consumers and their families and other interested parties relating to agency rules and regulations, policies and procedures, objectives, and services.
- d. Employees develop, implement, and monitor Individualized Plan for Employment with the consumer within the agency time standard to result in an employment outcome. The employee may recommend purchase of equipment and materials; provide service and skills training; provide job placement assistance and job development; and follow up services. Employees may serve as transition liaisons for potentially eligible and VR eligible transition students.
- e. Represent the agency in dealing with community groups, public and private organizations, vendors, and other public agencies.
- f. Employees provide outreach to high schools to provide pre-employment transition services, training, and education for teachers. Employees typically deal with individuals who are in transition or have disabling physical, medical, or emotional disorders and may be exposed to physical or verbal threats and communicable diseases. Provide advocacy and referral to other agencies as needed, ensuring comparable benefits are explored.
- g. Employees develop and maintain liaisons with public and private organizations, including employers, service providers, career centers, and community groups to exchange information, resolve problems, promote agency services, and to evaluate the suitability of educational programs, employment, and other consumer placement resources.
- h. Employees perform related duties such as scheduling, attending meetings & conferences, maintaining records, preparing reports/case notes in a professional manner to be read by consumer, family member, supervisory staff, or an advocate.
- i. Employees adhere to MRC rules and regulations regarding requests to attend training, vacation leave, personal leave, and sick leave requests.
- j. Familiarity with and ability to create/develop resumes and cover letters.
- k. Employees operate personal computers and other relevant technological devices.

Key Accountabilities: Incumbents at this level have the decision-making authority to:
Knowledge, Education, and Experience:

Applicants must have the substitutions listed below

Based on assignment, travel is required; incumbents who elect to use a motor vehicle for travel must have a current and valid motor vehicle driver's license at a class level specific to assignment.

Substitutions:

I. A Master's degree or higher in a related field such a Rehabilitation Administration/Services, Disability Studies, Vocational Assessment/Evaluation, Psychology, Developmental Psychology, Social Work, Human Services, Education, Special Education, Occupational Therapy, Counseling (Mental Health, Education, Psychology), or Substance Abuse Therapy and one (1) year of full-time or equivalent part-time experience in vocational counseling, job placement, career counseling and guidance, assessment and vocational evaluation, job development and services for employers may be substituted for the required (A) education. Relevant internship experience will be considered.

Incumbents are required to have the following at the time of hire:

- a. Rehabilitation Counseling Knowledge: Knowledge of the principles and practices of assisting people in coping with physical and/or mental disabilities to meet their vocational, social, and independent living needs, including evaluation, monitoring, testing, and training. Knowledge of the methods and techniques of determining individual interests, aptitudes, skills, and occupational preferences.
- b. End-User Applications: The use of Microsoft Office computer applications and ability to adapt to MRC's client case management system.
- c. Active Listening Skills: Listening to what other people are saying and asking questions as appropriate.
- d. Verbal and Written Comprehension: Understanding information and ideas, reading, and understanding information and ideas presented in writing.
- e. Verbal and Written Expression: Communicating information and ideas in writing so that others will understand.
- f. Complex Skills and Processes: Evaluating information against a set of standards and verifying that it is correct.
- g. Critical Thinking and Problem Solving: Using logic and analysis to identify strengths and weaknesses of different approaches.
- h. Interacting with Others, maintaining relationships, working with others: Developing constructive and cooperative working relationships with others; ability to deal tactfully with others; actively looking for ways to help people; being aware of others' reactions and understanding why they react the way they do; dealing directly with the public, including receiving clients or others doing business with the agency.
- i. Work Style: Being open to change (positive or negative) and to considerable variety in the workplace; being careful about detail and thorough in completing work tasks; being sensitive to others' needs and feelings and being understanding and helpful on the job;

being pleasant with others on the job and displaying a good-natured, cooperative attitude.

- j. Work Style: Being reliable, responsible, and dependable, and fulfilling obligations; being honest, avoiding unethical behavior, and maintaining confidentiality; persistence in the face of obstacles on the job; maintaining composure in very difficult situations; and dealing calmly and effectively with high stress situations.
- k. Ability to work well with diverse populations in diverse settings in a manner that builds trust and supports increased collaboration.
- l. Knowledge of the methods and techniques of determining individual interests, aptitudes, skills, and occupational preferences.
- m. Ability to exercise discretion in handling confidential information.

2. QUALIFIED VOCATIONAL REHABILITATION COUNSELOR II:

This is the mid-level position of this job series, known as the Senior Vocational Rehabilitation Counselor. Employees in this series evaluate individuals, including transition age students, with physical, emotional, or other impairments or multi-impairments to determine eligibility for vocational rehabilitation services under the Workforce Innovation and Opportunity Act of 2014; administer residual functional capacities assessments, interest tests, aptitude tests, transferable skills analysis and other vocational assessment tests; review and analyze diagnostic information through tests, records, interviews, and observations; develop, implement, and monitor Individualized Plans for Employment through onsite visits and conferences in a manner that allows the eligible consumer the opportunity to exercise Informed Choice in employment outcomes; recommend the purchase of equipment and materials including Assistive Technology for program and/or service use; provide service and skills training in individual and group settings; provide job placement assistance and job development; and confer with public and private organizations including other professionals, specialists, agency staff, employers, and others to promote and market agency programs and to review the suitability of client services, and related work as required. Employees will have sign off authority for their caseload once there is a record of satisfactory compliance and will be assigned complex cases. Employees may be assigned special duties by the area director or supervisor.

MRC is a learning and participatory performance culture with an emphasis on high performance teams, individual performance/contribution/impact, and engaging in activities to promote and support a program/division/agency (e.g., committee membership, Roadmap workgroup membership, presenting at Town Halls, achieving learning and performance goals). In addition, MRC is an agency committed to diversity, equity, inclusion, and racial equity, as well as innovation and transformation and change, and creating a culture of agility, excellence, and belonging.

Distinguishing Characteristics: This is the fully competent professional level classification in this series. Incumbents have thorough knowledge of policies, practices, and techniques and have mastered the technical job content, perform work of greater complexity, exercise greater

independence in making decisions and receive less supervision and review. At this level incumbents have sign off authority for individual caseloads and handle complex cases or transferred cases requiring exceptional mastery.

Supervision Received: Employees of positions at this level receive direct supervision from a Qualified Vocational Rehabilitation Counselor III or other employees of a higher grade who provide training and guidance on procedures and policy assigns work and reviews performance through conferences and reports for effectiveness and conformance with agency policy.

Supervision Exercised: Incumbents may provide functional direction to Qualified Vocational Counselor Level I or other employees of a lower grade through advice, guidance and assistance with tasks and participate in the training and mentoring of new employees and interns.

Essential Functions Performed:

- Employees meet with consumers who are physically, emotionally, mentally, or otherwise disabled, on a regular basis to conduct intake interviews and vocational counseling and guidance sessions, work collaboratively developing the IPE, and provide assistance with securing competitive employment.
- Employees determine and approve consumer eligibility within agency time standard for vocational rehabilitation services through the review and analysis of records, tests, observation, and interviews to determine occupational interests and abilities and the extent of disability and eligibility for agency services and programs to make recommendations to meet consumer needs. Complete standardized functional assessment to determine need and priority of service category.
- Explain and answer inquiries of consumers and their families and other interested parties relating to agency rules and regulations, policies and procedures, objectives, and services.
- Employees develop, implement, authorize, and monitor *Individualized Plan for Employment* with the consumer within the agency time standard to result in an employment outcome. The employee may recommend purchase of equipment and materials; provide service and skills training; may authorize closure documents, and financial documents that result in the commitment of state and federal funds and authorize changes in the type and level of services offered to consumers; provide job placement assistance and job development; and follow up services. Employees may serve as transition liaisons for potentially eligible and VR eligible transition students.
- Represent the agency in dealing with community groups, public and private organizations, vendors, and other public agencies.
- Employees provide outreach to high schools to provide pre-employment transition services, training, and education for teachers; Employees typically deal with individuals who are in transition or have disabling physical, medical, or emotional disorders and may be exposed to physical or verbal threats and communicable diseases. Provide advocacy and referral to other agencies as needed, ensuring comparable benefits are explored.

- Employees develop and maintain liaisons with public and private organizations, including employers, service providers, career centers, and community groups to exchange information, resolve problems, promote agency services, and to evaluate the suitability of educational programs, employment, and other consumer placement resources.
- Employees perform related duties such as scheduling, attending meetings and conferences, maintaining records, preparing reports/case notes in a professional manner to be read by consumer, family member, supervisory staff or an advocate.
- Employees adhere to MRC rules and regulations regarding requests to attend training, vacation leave, personal leave, and sick leave request. Expectation is that employees will have the ability and tools to perform their role in a manner that supports mobility to meet the consumer, provider, employer, and other partners.
- Familiarity with and ability to create/develop resumes and cover letters.
- Employees operate personal computers, and other relevant technological devices including peripherals such as printers, and scanners; standard office equipment such as copiers, telephones, and fax machines; and other keyboard equipment such as calculators.
- Employees may lead and organize office quality improvement projects as assigned by the Area Director.
- Employees may provide supervision for QVRC I staff during the short-term absence of the Unit Supervisor.
- Employees may provide at least one in-office training per year and serve as the office resource person in an area of exceptional mastery. (examples: Case management system, mobility impairment, substance abuse, mental health, ex-offender)
- Employees may mentor new counselors and/or those engaged in specialized and advanced degree requirements.
- Employees may supervise and mentor college/graduate level interns
- Employees may be the office coordinator for medical, psychiatric, or labor market consultation. (Coordinate office meetings, assist with case presentations, coordinate trainings, and make recommendations for services or next action.)
- Employees will be assigned complex cases or transfer cases requiring exceptional mastery.
- Employees may take responsibility for development and/or planning of at least one statewide or regional training program in an area that builds knowledge and/or skill level and addresses relevant vocational rehabilitation issues.
- Employees will have sign off authority for individual caseload once there is a record of satisfactory compliance.

Knowledge, Education, and Experience:

Applicants must have at least two (2) years of full-time or equivalent part-time experience in vocational counseling, job placement, career counseling and guidance, assessment and vocational evaluation, job development and services for employers, or (C) any equivalent combination of the required experience and the substitutions below.

Applicants working with Deaf and Hard-of-Hearing consumers must be proficient in American Sign Language (ASL) and may be required to demonstrate ASL proficiency through assessment by agency staff.

Based on assignment, travel is required; incumbents who elect to use a motor vehicle for travel must have a current and valid motor vehicle driver's license at a class level specific to assignment.

Substitutions:

I. A Master's degree or higher in a related field such a Rehabilitation Administration/Services, Disability Studies, Vocational Assessment/Evaluation, Psychology, Developmental Psychology, Social Work, Human Services, Education, Special Education, Occupational Therapy, Counseling (Mental Health, Education, Psychology), or Substance Abuse Therapy and one (1) year of full-time or equivalent part-time experience in vocational counseling, job placement, career counseling and guidance, assessment and vocational evaluation, job development and services for employers may be substituted for the required (A) education. Relevant internship experience will be considered.

Incumbents are required to have the following at the time of hire:

- a. Rehabilitation Counseling Knowledge: Knowledge of the principles and practices of assisting people in coping with physical and/or mental disabilities to meet their vocational, social, and independent living needs, including evaluation, monitoring, testing, and training. Knowledge of the methods and techniques of determining individual interests, aptitudes, skills, and occupational preferences.
- b. End User Applications: The use of computer applications such as Microsoft office suite, e-mail, the internet, and MRCIS.
- c. Active Listening Skills: Listening to what other people are saying and asking questions as appropriate.
- d. Verbal and Written Comprehension: Understanding information and ideas, reading, and understanding information and ideas presented in writing.
- e. Verbal and Written Expression: Communicating information and ideas in writing so that others will understand.
- f. Complex Skills and Processes: Evaluating information against a set of standards and verifying that it is correct.
- g. Critical Thinking and Problem Solving: Using logic and analysis to identify strengths and weaknesses of different approaches.

- h. Interacting with Others, maintaining relationships, working with others: Developing constructive and cooperative working relationships with others; ability to deal tactfully with others; actively looking for ways to help people; being aware of others' reactions and understanding why they react the way they do; dealing directly with the public, including receiving clients or other doing business with the agency.
- i. Work Style: Being open to change (positive or negative) and to considerable variety in the workplace; being careful about detail and thorough in completing work tasks; being sensitive to others' needs and feelings and being understanding and helpful on the job; being pleasant with others on the job and displaying a good-natured, cooperative attitude.
- j. Work Style: Being reliable, responsible, and dependable, and fulfilling obligations; being honest, avoiding unethical behavior, and maintaining confidentiality; persistence in the face of obstacles on the job; maintaining composure, in very difficult situations; and dealing calmly and effectively with high stress situations. Ability to exercise discretion in handling confidential information.
- k. Ability to work well with diverse populations in diverse settings in a manner that builds trust and supports increased collaboration.
- l. Knowledge of the methods and techniques of determining individual interests, aptitudes, skills, and occupational preference.
- m. Ability to exercise discretion in handling confidential information.
- n. Deductive and inductive Reasoning Ability: To apply general rules to specific problems to come up with logical answers. It involves deciding if an answer makes sense. To combine separate pieces of information, or specific answers to problems to form general rules or conclusions. It includes coming up with logical explanation for why a series of seemingly unrelated events occurs together.
- o. Complex Skills and Processes: Apply knowledge of agency policies, procedures, and practices; observe, receive, and obtain information from all relevant sources; evaluate the likely success of an idea in relation to the demands of the situation; developing plans to accomplish work, and prioritize, and organize one's own work.
- p. Idea Evaluation. Evaluating the likely success of an idea in relation to the demands of the situation.
- q. Resolving Conflict and Negotiating with Others. Handling complaints, arbitrating disputes, resolving grievances, or otherwise negotiating with others.
- r. Ability to use technology required for the job, including technology critical for remote work (e.g., Zoom, Outlook calendar, Teams, etc.).

3. QUALIFIED VOCATIONAL REHABILITATION COUNSELOR II (MENTAL HEALTH SPECIALITY)

The Massachusetts Rehabilitation Commission (MRC) and the Department of Mental Health (DMH) are seeking to improve competitive employment outcomes for individuals who are shared consumers of DMH and MRC through the development of a robust vocational

rehabilitation network of services, supports, counseling and guidance. The purpose of this program is for MRC to provide appropriate, individualized, vocational rehabilitation services and supports for DMH consumers enrolled in DMH's Adult Clinical Community Service (ACCS), with the ultimate goal of competitive, integrated employment.

MRC Mental Health Qualified Vocational Rehabilitation Counselors (VRCs) will work with job seekers to explore their interests, assess their needs, and determine the best pathway to ensure successful integrated competitive employment.

MRC will provide an array of comprehensive and coordinated employment supports, including procuring services from the provider community to assist job seekers with achieving their employment goals as part of an overall career pathway.

Employees in this position will lead and facilitate an Integrated Resource Team (IRT) approach to meet the needs of an individual job seeker. The IRT model utilizes a combined team approach, maximizing wrap around services to support the job seeker with ongoing partnerships and communication. The work of VRCs is community-based. VRCs will meet with job seekers in a variety of settings that could include, but are not limited to, community programs, DMH offices, MRC offices, and other community settings.

Duties and Responsibilities (these duties are a general summary and not all inclusive):

- Fosters an “informed choice” model of professional vocational counseling for individuals with persistent mental health/behavioral health conditions and/or co-occurring disorders who are receiving services from DMH.
- Incorporates ongoing engagement strategies within the VR system while providing on-going supports to facilitate completion of activities outlined in the Individualized Plan for Employment.
- Determines eligibility for vocational rehabilitation services under the Workforce Innovation and Opportunity Act (WIOA) of 2014.
- Administers functional capacity assessments, interest tests, aptitude tests, transferable skills analysis and other vocational assessments and shares information with job seeker and others as authorized by the job seeker.
- Reviews and analyzes diagnostic information through tests, records, interviews, and observations.
- Leads and facilitates the collaborated team to develop, implement, and monitor Individualized Plans for Employment in a manner that allows eligible job seekers the opportunity to exercise informed choice in employment outcomes.
- Recommends the purchase of services, equipment, and materials including Assistive Technology.
- Facilitates services and skills training in individual and group settings.
- Provides opportunities for job seekers to select service providers or MRC placement team to deliver job development, placement, and retention assistance.

- Partners with public and private organizations including, but not limited to, other agency staff, employers, community rehabilitation providers, state agencies, workforce partners, and schools to promote and market agency programs, collaborate, and coordinate in the delivery of consumer supports and services.

Preferred Qualifications:

- Knowledge of counseling and job placement of persons with vocational/occupational barriers, including physical, emotional, psychological, and intellectual disabilities;
- Familiarity with utilizing psychological tests and other evaluative techniques;
- Commitment to lifelong learning in relationship to their own professional development;
- Outstanding organizational, written, and oral communications skills; attention to detail;
- Capacity to gather, analyze, and evaluate significant case information pertinent to rehabilitation of an individual;
- Ability to serve as a mentor and provide guidance to others;
- Proficient usage of Microsoft Office products including Word, Excel, and Outlook; prior use of client database systems.

MINIMUM ENTRANCE REQUIREMENTS:

Applicants must have at least (B) two (2) years of full-time or equivalent part-time experience in vocational counseling, job placement, career counseling and guidance, assessment and vocational evaluation, job development and services for employers, or (C) any equivalent combination of the required experience and the substitutions below.

Applicants working with Deaf and Hard-of-Hearing consumers must be proficient in American Sign Language (ASL) and may be required to demonstrate ASL proficiency through assessment by agency staff. Based on assignment, travel is required; incumbents who elect to use a motor vehicle for travel must have a current and valid motor vehicle driver's license at a class level specific to assignment.

Substitutions:

I. A Master's degree or higher in a related field such a Rehabilitation Administration/Services, Disability Studies, Vocational Assessment/Evaluation, Psychology, Developmental Psychology, Social Work, Human Services, Education, Special Education, Occupational Therapy, Counseling (Mental Health, Education, Psychology), or Substance Abuse Therapy and one (1) year of full-time or equivalent part-time experience in vocational counseling, job placement, career counseling and guidance, assessment and vocational evaluation, job development and services for employers may be substituted for the required (A) education. Relevant internship experience will be considered.

4. JOB PLACEMENT SPECIALIST:

The Job Placement Specialist (JPS) will consult with Vocational Rehabilitation Counselors to assess and evaluate the job readiness of consumers, analyze skills and abilities for correct

employment matches. Make recommendations to proceed with job referral process. Identify accommodations and training needed that may be required within the workplace.

Interpret residual functional capacities assessments, interest tests and aptitude tests. Assess transferable skills, review, and analyze diagnostic information through tests, records, interviews, and observations. Develop, implement, and monitor placement services included in Individualized Plans for Employment through onsite visits and conferences in a manner that allows the eligible consumer the opportunity to exercise Informed Choice in employment outcomes. Educate employers regarding skills, abilities, and limitations of consumers. Consult with employers to determine job expectations and market these employment expectations to Vocational Rehabilitation Counselors. Make specific recommendations to employers for hiring consumers. Confers with agency staff, clients' families, employers, professional specialist, and others to exchange client information and determine appropriateness of employment opportunities and resources for education, training, job placement assistance and employment for clients. Conduct group workshops for clients in interviewing skills, resume writing, introduction, and assistance with using the area office's resource room, etc., to prepare them for job opportunities. Professionally explain and answer inquiries relating to rules, regulations, policies, and procedures to inform clients, their families and other interested parties about agency programs, objectives, and services.

Monitors and evaluates client progress through individual meetings with client, on-site visits, review of reports, etc., provide vocational counseling to assist client adjustment to new situations and determine whether services, programs or placement are meeting client needs. JPS may assist in maintaining a liaison with the local Career Centers for the purpose of providing consumers with information about employment opportunities, job seeking, and methods of applying for jobs.

Schedule: travel 25% of the time.

The Massachusetts Rehabilitation Commission (MRC) promotes equality, empowerment, and independence of individuals with disabilities. These goals are achieved through enhancing and encouraging personal choice and the right to succeed or fail in the pursuit of independence and employment in the community. The MRC provides comprehensive services to people with disabilities that maximize their quality of life and economic self-sufficiency in the community.

Applicants must have at least (A) Master's degree or higher in Rehabilitation Counseling from a Council on Rehabilitation Education (CORE) accredited university program, or a certification as a Certified Rehabilitation Counselor (CRC) by the Commission of Rehabilitation Counselor Certification or licensure as a Licensed Rehabilitation Counselor and (B) two (2) years of full-time or equivalent part-time experience in vocational counseling, job placement, career counseling and guidance, assessment and vocational evaluation, job development and services for employers, or (C) any equivalent combination of the required experience and the substitutions below.

Applicants working with Deaf and Hard-of-Hearing consumers must be proficient in American Sign Language (ASL) and may be required to demonstrate ASL proficiency through assessment by agency staff. Based on assignment, travel is required; incumbents who elect to use a motor

vehicle for travel must have a current and valid motor vehicle driver's license at a class level specific to assignment.

Substitutions:

I. One (1) year of full-time or equivalent part-time experience in vocational counseling, job placement, career counseling and guidance, assessment and vocational evaluation, job development and services for employers may be substituted for the required (A) education. Relevant internship experience will be considered.

An Equal Opportunity / Affirmative Action Employer. Females, minorities, Veterans, and persons with disabilities are strongly encouraged to apply.

5. QUALIFIED VOCATIONAL REHABILITATION COUNSELOR III:

Distinguishing Characteristics: This is the supervisory classification in this series. Incumbents provide supervision and guidance on complex or specialized casework to Qualified Vocational Rehabilitation Counselor Level I and II's within their work unit. At this level, incumbents may perform the duties for Qualified Vocational Rehabilitation Counselor Levels I and II, but the primary focus is to provide formal and informal supervision and act as the liaison between Qualified Vocational Rehabilitation Counselors and agency management. Supervise and monitor unit activities such as evaluation and case maintenance to ensure effective service delivery and compliance with agency policy and standards; coordinate administrative and clinical support for agency units and programs.

Supervise Qualified Vocational Rehabilitation Counselor I & II by assigning and directing the activities of reporting staff and appraising their performance in evaluating individuals with physical, emotional, or other impairments or multi-impairments to determine eligibility for vocational rehabilitation services under the Workforce Innovation and Opportunity Act (WIOA); participate in the hiring and promotional process; notify management when corrective action may be appropriate; and provide support to enhance employee performance. Determine service delivery hours and caseloads to staff consistent with agency policies and consumer needs. Recommends contract and budget control actions by analyzing spending patterns and monthly and quarterly reports in order to maximize funds available for consumer services and to anticipate financial needs and assure appropriate transfer of funds. Review and sign off on case load for Qualified Vocational Rehabilitation Counselor I's and QVRC II's as appropriate; administer residual functional capacities assessments, interest tests, aptitude tests, transferable skills analysis and other vocational assessment tests; review and analyze diagnostic information through tests, records, interviews, and observations; develop, implement, and monitor *Individualized Plans for Employment* through onsite visits and conferences in a manner that allows the eligible consumer the opportunity to exercise Informed Choice in employment outcomes; recommend the purchase of equipment and materials including Assistive Technology for program and/or service use; provide service and skills training in individual and group settings; provide job placement assistance and job development; and confer with public and private organizations including other professionals, specialists, agency staff, employers, and others to promote and market agency programs and to review the suitability of client services.

MRC is a learning and participatory performance culture with an emphasis on high performance teams, individual performance/contribution/impact, and engaging in activities to promote and support a program/division/agency (e.g., committee membership, Roadmap workgroup membership, presenting at Town Halls, achieving learning and performance goals). In addition, MRC is an agency committed to diversity, equity, inclusion, and racial equity, as well as innovation, transformation, and change, and creating a culture of agility, excellence, and belonging.

Supervision Received: Incumbents of positions at this level receive general supervision from an Administrator VI, who provides broad policy guidance, assigns work, and reviews performance through conferences and reports for effectiveness and conformance with agency policy.

Supervision Exercised: Incumbents may exercise direct supervision over, assign work to and review the performance of Qualified Vocational Rehabilitation Counselor Level I and II or other employees of a lower grade.

Incumbents may provide functional direction to Qualified Vocational Counselor Level I and Level II or other employees of a lower grade through advice, guidance and delegation of tasks and participate in the training and mentoring of new employees.

Incumbents may participate in the interviewing process or may make recommendations for new hires.

Essential functions Performed:

- a. Supervise and monitor unit activities such as client evaluation and case maintenance to ensure effective service delivery and compliance with agency policy and standards; coordinate administrative and clinical support for agency units and programs.
- b. Plan, develop and implement unit and agency programs; assist in developing and implementing client needs assessment programs; develop and implement policies and procedures for assigned units and programs in accordance with agency regulations and applicable laws; and determine service delivery hours and caseloads to staff consistent with agency policy and client needs.
- c. Plan, develop and conduct orientation and training of agency and other staff in vocational and pre-vocational programs and services.
- d. Establish and maintain program and unit information systems; prepare and monitor program/unit budget and allocation of funds.
- e. Evaluate job performance of subordinates, participate in the hiring and promotional process; notify management when corrective action may be appropriate; and provide support to enhance employee performance. Monitoring and approving time and attendance.
- f. Provide vocational rehabilitation counseling services to clients deemed to present particular difficult challenges, such as, persons with multiple disabilities; persons who have been unsuccessful with other rehabilitation counselors; persons who have an extended history with the agency, to insure provision of appropriate services.

- g. Coordinate the marketing of Massachusetts Rehabilitation Commission services office wide: by developing a marketing plan; coordinating the plan among office staff; monitoring the progress of the plan to ensure the community is aware of and understands how to appropriately utilize the agency.
- h. Coordinate office wide job development in coordination with the marketing of the agency, by developing an office wide job development program; coordinating counselors' employer contacts for job leads; coordinating the office wide list of job ready clients to match up with job leads; monitor the progress of the plan to ensure that clients are assisted with their job search.
- i. May act as liaison regarding specific disabilities or special populations within the district, by attending meetings with counselors from other offices to strategize to reach the specific populations or discussing current information on the target groups and may provide input to the development of policies and procedures with reference to the targeted groups so that the agency is reaching all individuals with disabilities that are in need of the agency's services.
- j. Coordinate SSI/SSDI referrals by acting as office consultant on all matters related to SSI/SSDI clients receiving benefits from SSA Administration including liaison and consultant to the administration and utilization of the PASS Plan (Plan for Achievement of Self Support).
- k. Coordinate the State and Federal Compliance Review Audits by gathering the sample studies; conducting in-house reviews of cases for compliance; providing the Administrative Office Program Evaluation staff with requested materials, information, and evaluations as requested to ensure the agency is complying with Federal, State and Agency's policies, procedures, and regulations regarding vocational rehabilitation.

Knowledge, Education, and Experience:

Applicants must have at least (B) three (3) years of full-time or equivalent part-time experience in vocational counseling, job placement, career counseling and guidance, assessment and vocational evaluation, job development and services for employers, of which one (1) year must have been in a supervisory or leadership capacity or (C) any equivalent combination of the required experience and the substitutions below.

Based on assignment, travel is required; incumbents who elect to use a motor vehicle for travel must have a current and valid motor vehicle driver's license at a class level specific to assignment.

Applicants working with Deaf and Hard-of-Hearing consumers must be proficient in American Sign Language (ASL) and may be required to demonstrate ASL proficiency through assessment by agency staff.

Substitutions:

I. A master's degree or higher in a related field such a Rehabilitation Administration/Services, Disability Studies, Vocational Assessment/Evaluation, Psychology, Developmental Psychology, Social Work, Human Services, Education, Special Education, Occupational Therapy, Counseling

(Mental Health, Education, Psychology), or Substance Abuse Therapy and one (1) year of full-time or equivalent part-time experience in vocational counseling, job placement, career counseling and guidance, assessment and vocational evaluation, job development and services for employers may be substituted for the required (A) education. Relevant internship experience will be considered.

Qualifications required at time of hire:

- a. Ability to analyze information and using logic to address work or job issues and problems.
- b. Ability to identify things that must be changed to achieve goals.
- c. Ability to determine the long-term outcomes of a change in operations.
- d. Ability to develop approaches for implementing ideas.
- e. Ability to make decisions and solve problems by combining, evaluating, and reasoning with information and data to make decisions and solve problems. These processes involve making decisions about the relative importance of information and choosing best solutions.
- f. Ability to teach others how to do something.
- g. Ability to bring others together and trying to reconcile differences.
- h. Ability to coach and develop others by identifying the developmental needs of others and coaching or otherwise helping others to improve their knowledge and skills.
- i. Ability to coordinate the members of a work group to accomplish a task.
- j. Ability to develop a team by encouraging and building mutual trust, respect, and cooperation among team members.
- k. Ability to guide, direct and motivate subordinates.

6. EMPLOYMENT SERVICE SPECIALIST I

The Employment Service Specialist Markets and promotes the services of the Massachusetts Rehabilitation Commission (MRC) to employers and other interested parties in the office's district; develops and implements promotional programs; gathers and disseminates labor market information; provides technical assistance concerning recruitment of the Massachusetts Rehabilitation Commission's Consumers; establishes and maintains working relationships with employers; plans and organizes job fairs and recruitments; establishes and maintains a data bank of information on local employers; assists Massachusetts Rehabilitation Commission's staff by soliciting employment opportunities for specific consumers with disabilities and performs related duties as required

SUPERVISION RECEIVED

Receives general supervision from a supervisor that plans, assigns, and oversees work. Supervisor provides guidance and instruction regarding laws and regulations as well as MRC policies, procedures, guidelines, and standards. Supervisor regularly reviews work to ensure

compliance. Supervisor conducts qualitative and quantitative analysis of the incumbent's work performance. These managers may provide input to the MRC ESS supervisor regarding functional job performance.

Essential Functions:

- a. Markets and promotes MRC services and programs to area employers and other interested parties by visiting businesses and other locations to explain and describe MRC programs and services. Solicit employer participation and obtain employment opportunity listings (*Job Orders*) that meet established guidelines and standards, with regard to content, in order to adequately serve the Massachusetts Rehabilitation Commission's job seeking customers.
- b. Devise and implement strategies for the development of sector and employer-based training opportunities for persons with disabilities; identifies specific industries and employers to target and market employer-based training initiative.
- c. Establishes and maintains effective working relationships with area employers by making personal visits to determine employer needs, communicate MRC services, and incentives available to employers who train and employ individuals with disabilities.
- d. Develop and maintain employer relationships, as well as, act as a problem-solving liaison for employers with unfilled employment opportunities by suggesting solutions such as restructuring job requirements, and training programs that result in replicable and sustainable employment opportunities for persons with disabilities.
- e. Ensures that the MRC staff is aware of the employers' needs and job order specifications to facilitate the prompt and effective servicing of job orders that match the needs of MRC consumers/job seekers.
- f. Assists with planning, organizing, and conducting job fairs, special events, and recruitments to provide large scale labor exchange opportunities for both employers and MRC job seekers.
- g. Establishes and maintains a data bank of information on local area employers through on-site visits to facilitate the placement of MRC Consumers and the filling of employer needs; records and updates information on appropriate MRC forms and inputs data as necessary via computer to maintain various MRC computerized information systems.
- h. Establishes and maintains effective working relationships with peers, supervisors, and MRC partners. Actively interfaces with the MRC Job Placement Specialists (JPS) and Vocational Rehabilitation Counselors (VRC) to convey information regarding employer training and employment requirements to ensure appropriate referral, screening, and selection of MRC Consumers for training and employment opportunities.
- i. Work closely with employers and identifying position(s) that could readily adapt to an on-the-job/employer or sector-based training model; assist employers with curriculum development and required staffing/community resources, as needed, for skills training and soft skills training.
- j. Work closely with MRC Job Placement Specialist and Vocational Rehabilitation Counselor to identify, assess, screen, and recommend consumers for training; assist

MRC Job Placement Specialist and or Vocational Rehabilitation Counselor in preparing consumers to interview for training and employment opportunities.

- k. Work closely with JPS and VRC to identify tutors and job coaches via vendor organizations to assist with training and employment skill and task development.
- l. Ensure placement of MRC Consumers into sector based and on-the-job training opportunities.
- m. Assist employers in assessing need for and obtaining adaptive equipment and other resources
- n. Proactively deliver follow-up support services to employers and consumers in collaboration with JPS, VRC, and community organizations, as needed, to ensure successful employment outcomes and employer satisfaction.
- o. May conduct group presentations in conjunctions with JPS (in and out of the office) to explain programs and services to employers, training vendors, community organizations, job seekers, and the general public, and to assist them in using such programs and services.
- p. Participates in staff development and cross training opportunities that expand and support functional skills and promote professional growth.

Qualifications:

(A) at least three (3) years of full-time or equivalent part-time professional experience in: business management, business administration, public relations, marketing, personnel interviewing, recruitment, or job placement; employment, vocational, educational, psychological, sociological or rehabilitation counseling or guidance; job analysis or position classification work or any equivalent combination of the required experience and the substitutions below.

Extensive travel is required; incumbents who elect to use a motor vehicle for travel must possess a current and valid motor vehicle driver's license at a class level specific to assignment.

Substitutions:

I. A bachelor's degree or higher in marketing, business management, business administration, public relations or public administration may be substituted for two (2) years of the required experience.

LICENSE AND/OR CERTIFICATION REQUIREMENTS

- a. A valid motor vehicle operators' license.
- b. Qualifications Required at Hire:
- c. Knowledge of a wide variety of occupations common to the area labor market.
- d. Knowledge of the principles, practices, and techniques of marketing and sales
Knowledge of interviewing techniques.

- e. Ability to market and promote MRC services and job seekers/consumers.
- f. Ability to communicate effectively in oral and written expression.
- g. Ability to give written and oral instructions in a precise and understandable manner.
- h. Ability to establish rapport and working relationships with individuals from a wide variety of different cultural, ethnic, and economic backgrounds.
- i. Ability to stimulate interest in MRC programs, services, and consumers.
- j. Demonstrated knowledge of principles and techniques of human service interviewing.
- k. Ability to understand, explain and implement policies and procedures, standards, guidelines, laws, and regulations that govern Massachusetts Rehabilitation Commission activities.
- l. Demonstrated knowledge of principles and practices of conducting workshops.
- m. Proven ability to interact in a team environment and to establish and maintain harmonious working relationships with peers, supervisors, other agency representatives, employers, and customers.
- n. Working knowledge of MS Windows and Word. Proven ability to accurately and concisely record information and maintain the integrity of the computerized database.

Employment Service Specialist II:

This is the mid-level job placement position of this job classification level. This position markets and promotes the services of the Massachusetts Rehabilitation Commission (MRC) to employers and other interested parties in the office's district; develops and implements promotional programs; gathers and disseminates labor market information; provides technical assistance concerning recruitment of the Massachusetts Rehabilitation Commission's Consumers; establishes and maintains working relationships with employers; plans and organizes job fairs/hiring events and recruitments; establishes and maintains a data bank of information on local employers; assists Massachusetts Rehabilitation Commission's staff by soliciting employment opportunities for specific consumers with disabilities and performs related duties as required. Provides information and coordinates job-driven training programs in which Massachusetts Rehabilitation Commission Consumer's would be readily available to be trained and employed with open positions within various market sectors. Confers with job placement specialists and area directors for development of employment plans specific to demographics of the local area offices. Provides specific job placement services training to counselors and other staff. Provides guidance for less experienced employment services specialists.

MRC is a learning and participatory performance culture with an emphasis on high-performance teams, individual performance/contribution/impact, and engaging in activities to promote and support a program/division/agency (e.g., committee membership, Roadmap workgroup membership, presenting at Town Halls, achieving learning and performance goals). In addition, MRC is an agency committed to diversity, equity, inclusion, and racial equity, as well

as innovation, transformation, change, and creating a culture of agility, excellence, and belonging.

SUPERVISION RECEIVED:

Receives general supervision from a supervisor that plans, assigns, and oversees work. Supervisor provides guidance and instruction regarding laws and regulations as well as MRC policies, procedures, guidelines, and standards. Supervisor regularly reviews work to ensure compliance. Supervisor conducts qualitative and quantitative analysis of the incumbent's work performance. These managers may provide input to the MRC ESS supervisor regarding functional job performance.

ESSENTIAL FUNCTIONS:

- a. Markets and promotes MRC services and programs to area employers and other interested parties by visiting businesses and other locations to explain and describe MRC programs and services. Solicit employer participation and obtain employment opportunity listings (*Job Orders*) that meet established guidelines and standards, with regard to content in order to adequately serve the Massachusetts Rehabilitation Commission's job seeking customers.
- b. Devise and implement strategies for the development of sector and employer-based training opportunities for persons with disabilities; identifies specific industries and employers to target and market employer-based training initiative.
- c. Establishes and maintains effective working relationships with area employers by making personal visits to determine employer needs, communicate MRC services, and incentives available to employers who train and employ individuals with disabilities.
- d. Develop and maintain employer relationships, as well as act as a problem-solving liaison for employers with unfilled employment opportunities by suggesting solutions such as restructuring job requirements, and training programs that result in replicable and sustainable employment opportunities for persons with disabilities.
- e. Ensures that the MRC staff is aware of the employer's needs and job order specifications to facilitate the prompt and effective servicing of job orders that match the needs of MRC consumers/jobseekers.
- f. Assists with planning, organizing, and conducting job fairs, special events, and recruitments to provide large scale labor exchange
- g. opportunities for both employers and MRC job seekers.
- h. Establishes and maintains a data bank of information on local area employers through on-site visits to facilitate the placement of MRC Consumers and the filling of employer needs; records and updates information on appropriate MRC forms and inputs data as necessary via computer to maintain various MRC computerized information systems.

- i. Establishes and maintains effective working relationships with peers, supervisors, and MRC partners. Actively interfaces with the MRC Job Placement Specialists (JPS) and Vocational Rehabilitation Counselors (VRC) to convey information regarding employer training and employment requirements to ensure appropriate referral, screening, and selection of MRC Consumers for training and employment opportunities.
- j. Identifies employers that are readily available and interested in providing Job-Driven Training Programs for MRC Consumers.
- k. Assists with coordinating and ensuring that Job-Driven Training programs provide competitive employment outcomes for MRC Consumers.
- l. Work closely with employers and identifying position(s) that could readily adapt to an On-The-Job /employer or sector-based training model; assist employers with curriculum development and required staffing /community resources, as needed, for skills training and soft skills training.
- m. Work closely with MRC Job Placement Specialist and Vocational Rehabilitation Counselor to identify, assess, screen, and recommend consumers for training; assist MRC Job Placement Specialist and or Vocational Rehabilitation Counselor in preparing consumers to interview for training and employment opportunities.
- n. Work closely with JPS and VRC to identify tutors and job coaches via vendor organizations to assist with training and employment skill and task development.
- o. Ensure placement of MRC Consumers into sector based and On-The-Job training opportunities.
- p. Assist employers in assessing need for and obtaining adaptive equipment and other resources
- q. Proactively deliver follow-up support services to employers and consumers in collaboration with JPS, VRC, and community organizations, as needed, to ensure successful employment outcomes and employer satisfaction.
- r. May conduct group presentations in conjunctions with JPS (in and out of the office) to explain programs and services to employers, training vendors, community organizations, jobseekers, and the general public, and to assist them in using such programs and services.
- s. Participates in staff development and cross training opportunities that expand and support functional skills and promote professional growth.

Required Qualifications:

Applicants must have (B) at least two (2) years of full-time or equivalent part-time professional experience in: business management, business administration, public relations, marketing, personnel interviewing, recruitment or job placement; employment, vocational counseling , psychology, sociology, education or rehabilitation counseling or guidance; job analysis or position classification work, of which (C) at least one (1) year must have been working with individuals with disabilities, or (D) any equivalent combination of the required experience and

the substitutions below. Page 6 of 9 Extensive travel is required; incumbents who elect to use a motor vehicle for travel must possess a current and valid motor vehicle driver's license at a class level specific to assignment. Substitutions: I. A master's degree or higher in marketing, business management, business administration, vocational rehabilitation, public relations or public administration, counseling, psychology, human resources, or related field may be substituted for one (1) year of the required (B) experience.

Qualifications Required at Hire:

- a. Knowledge of a wide variety of occupations common to the area labor market.
- b. Knowledge of the principles, practices, and techniques of marketing and sales, Knowledge of interviewing techniques.
- c. Ability to market and promote MRC services and job seekers/consumers.
- d. Ability to communicate effectively in oral and written expression.
- e. Ability to give written and oral instructions in a precise and understandable manner.
- f. Ability to establish rapport and working relationships with individuals from a wide variety of different cultural, ethnic, and economic backgrounds.
- g. Ability to stimulate interest in MRC programs, services, and consumers.
- h. Demonstrated knowledge of principles and techniques of human service interviewing.
- i. Ability to understand, explain and implement policies and procedures, standards, guidelines, laws, and regulations that govern Massachusetts Rehabilitation Commission activities.
- j. Demonstrated knowledge of principles and practices of conducting workshops.
- k. Proven ability to interact in a team environment and to establish and maintain harmonious working relationships with peers, supervisors, other agency representatives, employers, and customers.
- l. Working knowledge of MS Windows and Word. Proven ability to accurately and concisely record information and maintain the integrity of the computerized database.
- m. Two years of job placement services experience for individuals with disabilities.

Employment Service Specialist III:

This is the supervisory level position of this classification series. The Massachusetts Rehabilitation Commission, Job Placement Services Supervisor will function as the MRC District Supervisor for delivery of job placement services for the MRC Area Office within the district, and is responsible for planning, development, and monitoring of the employer outreach and employment plans for multiple area offices. Supervise a staff of 8-10 comprised of job placement services specialist and employment services specialist. The job placement services district director will implement employment plans in collaboration with the district and area directors. Analyze job placement services workflow and assigns employer engagement activities ensuring quality control for the MRC Employer Account System. Facilitate, coordinate, and monitor Job Driven Employer Training Programs for the district. Assists the Statewide Job

Placement Services Director with the day-to-day functions of job placement services. Supervises the job placement services specialist and employment services specialists while ensuring compliance with agency guidelines and policies. The job placement unit supervisor works closely with both the job placement specialist, employment services specialist, vocational rehabilitation counselor, area office supervisor(s) and area director. Responsible for proper utilization of the MRC Job Placement Services Manual; while ensuring that each of the area office employment plans incorporate job driven training programs to meet the needs of the local and regional labor markets. Ability to work remotely while providing effective supervision of staff; ability to resolve conflicts and provide identifiable solutions to complex work-related issues.

Supervision Received:

Receives general supervision from a supervisor/manager that plans, assigns, and oversees work. Supervisor provides guidance and instruction regarding laws and regulations as well as MRC policies, procedures, guidelines, and standards. Supervisor regularly reviews work to ensure compliance. Supervisor conducts qualitative and quantitative analysis of the incumbent's work performance. These managers may provide input to the MRC ESS supervisor regarding functional job performance.

Essential Functions:

- a. Supervises subordinate employees by monitoring of assigned responsibilities and tasks, and to ensure compliance with agency rules, policies, procedures, and guidelines.
- b. Review, monitor and ensure that the production standard is met for the job placement services specialists and employment services specialists.
- c. Responsible for accurate documentation of all job placement activities and production is reflected on MRCIS.
- d. Ensure that MRC Consumers are being identified appropriately for job-driven training programs.
- e. Ensure that that Job-Driven Training programs provide competitive employment outcomes for MRC Consumers.
- f. Work closely with the job placement specialists and employment specialists in identifying employers that are interested in long term partnerships with MRC.
- g. Work closely with MRC Job Placement Specialist, Employment Services Specialists and Vocational
- h. Rehabilitation Counselor to identify, assess, screen, and recommend consumers for training; assist MRC Job Placement Specialist and or Vocational Rehabilitation Counselor in preparing consumers to interview for training and employment opportunities.
- i. Ensure the MRC Job Placement Services Manual is being utilized and is consistent with best practices in the district

- j. Work closely with the MRC Business Improvement Partners to understand the role and scope of services being provided via vendor organizations to assist with training and employment skill and task development.
- k. Ensure that district and area office job placement are occurring to the satisfaction of the area directors as provided by the employer outreach employment plan.
- l. Ensure placement of MRC Consumers into sector based and On-The-Job training opportunities.
- m. Assist employers in assessing need for and obtaining adaptive equipment and other resources
- n. Proactively deliver follow-up support services to employers and consumers in collaboration with JPS, VRC, and community organizations, as needed, to ensure successful employment outcomes and employer satisfaction.
- o. May conduct group presentations in conjunctions with JPS (in and out of the office) to explain programs and services to employers, training vendors, community organizations, job seekers, and the general public, and to assist them in using such programs and services.
- p. Participates in staff development and cross training opportunities that expand and support functional skills and promote professional growth.

Qualifications:

5 years of experience (of which 3 must be supervisory) of full-time or equivalent part-time professional or technical experience in any of the following: (1) personnel interviewing, recruitment, or job placement; (2) employment, vocational, educational, psychological, sociological or rehabilitation counseling or guidance (3) credit or claims adjustment interviewing; (4) job analysis or position classification work.

Equivalent combination of such experience and allowable substitutions permitted. A master's or higher degree in marketing, business management, public administration or a related field from a recognized college or university may be substituted for two years of experience. Education toward such a degree will be prorated, on the basis of the proportion of the requirement actually completed.

Qualifications required at hire:

- a. Knowledge of a wide variety of occupations common to the area labor market.
- b. Knowledge of the principles, practices, and techniques of marketing and sales.
Knowledge of interviewing techniques.
- c. Ability to market and promote MRC services and job seekers/consumers.
- d. Ability to communicate effectively in oral and written expression.
- e. Ability to give written and oral instructions in a precise and understandable manner.

- f. Ability to establish rapport and working relationships with individuals from a wide variety of different cultural, ethnic, and economic backgrounds.
- g. Ability to stimulate interest in MRC programs, services, and consumers.
- h. Demonstrated knowledge of principles and techniques of human service interviewing.
- i. Ability to understand, explain and implement policies and procedures, standards, guidelines, laws, and regulations that govern Massachusetts Rehabilitation Commission activities.
- j. Demonstrated knowledge of principles and practices of conducting workshops.
- k. Proven ability to interact in a team environment and to establish and maintain harmonious working relationships with peers, supervisors, other agency representatives, employers, and customers.
- l. Working knowledge of MS Windows and Word. Proven ability to accurately and concisely record information and maintain the integrity of the computerized database.

(B) The establishment and maintenance of education and experience requirements, in accordance with section 101(a)(7)(B)(ii) of the Rehabilitation Act, to ensure that the personnel have a 21st century understanding of the evolving labor force and the needs of individuals with disabilities.

All MRC vocational rehabilitation counselors are expected to meet at least the education and experience requirements of a Qualified Vocational Rehabilitation Counselor. Promotional opportunities in the series would require more experience and/or a higher educational level.

IN-SERVICE TRAINING AND CONTINUING EDUCATION:

MRC's Office of Learning and Community Engagement supports a wide variety of training and development programs for all staff through a comprehensive training program. MRC's trainings continue to focus on compliance with WIOA regulations and guidelines, and on working with our workforce partners and other disability agencies to provide coordinated services. MRC will continue to provide training to its staff to enhance their skills, professional development, and enhanced practices to best serve consumer needs.

A series of workshops and seminars have been and will continue to be planned in the following priority areas:

Vocational Rehabilitation best practices, trainings related to the agency's initiatives with the Department of Mental Health and the Department of Transitional Assistance, substance abuse training in partnership with the Department of Public Health, diversity and DEIA trainings through the Human Resources Division, trainings on Measurable Skills Gains and other WIOA performance measures, Pre-Employment Transition Services, quality employment outcomes, leadership development and succession training, transportation options, transitional planning,

serving consumers on the autism spectrum, and programs under Section 4 of the Assistive Technology Act of 1998 (operated by MRC), training on fiscal agility, and training related to MRC Connect integrated eligibility unit.

MRC also continues to offer ongoing professional development for VR counselors, managers, supervisors.

These trainings address 21st century labor trends, high growth occupations and skills that are in demand, trainings on job accommodations and employment tax credits, amongst other topics. MRC also makes trainings available in cooperation with staff labor unions on professional development, including computer software training and online training via LinkedIn's Learning Online training site and the state's MassAchieve training site.

MRC has also worked with the state HR Division's Center for Staff Development to develop a certificate program for aspiring managers and supervisors where staff works to gain leadership and management skills guided by a supervisor or manager serving as a mentor. Also, project management and leadership certificates are available through this program. Finally, MRC operates a regular new staff orientation to assist with educating and retaining staff.

MRC acquires and routinely disseminates rehabilitation materials and research to staff such as the latest publications from the Institute on Rehabilitation on Issues, training materials from the Research and Training Centers, training guides and resource materials produced by recipients of RSA grants, and products from the National Clearinghouse of Rehabilitation Training Materials, as well as information and knowledge from RSA VR Technical Assistance centers such as the American Indian Vocational Rehabilitation Training and Technical Assistance Center (AIVRTTAC), National Technical Assistance Center on Transition: The Collaborative (NTACT:C), Vocational Rehabilitation Technical Assistance Center for Quality Employment (VRTAC-QE), Vocational Rehabilitation Assistance Center for Quality Management (VRTAC-QM). MRC also disseminates materials and information from the National Rehabilitation Association, the Association of People Supporting Employment First, Explore VR, and other sources. These information and materials are also discussed and utilized in training and staff development meetings and webinars

(4) Method(s) the VR agency uses to ensure that personnel are able to communicate in appropriate modes of communication with or in the native language of applicants or eligible individuals who have limited English speaking ability.

MRC has dedicated VR counselors skilled in American Sign Language (ASL) and are qualified to work with consumers who are Deaf or Hard-of-Hearing. In addition, MRC has counselors fluent in the following languages throughout the state: Spanish, Cantonese, Vietnamese, Portuguese, Khmer, French/Haitian Creole, Hindi, and Tamil. Some area directors, head clerks and other clerical staff are fluent in American Sign Language, Spanish, Khmer, Cantonese, Mandarin, Haitian Creole, or Portuguese. Eleven full and part-time sign language interpreters are also on

staff. MRC also works with its contracted service providers for CIES and Pre-ETS to provide communication coordination for consumers referred by MRC to these contracts. MRC has a bilingual committee of staff which provide support in this area. MRC also works with Cross Cultural Community Services (CCCS) (<https://embracingculture.com/>) and other vendors on the statewide contract to facilitate communication needs for individuals served by MRC who speak languages other than English.

MRC Connect Integrated Eligibility offers the MRC online application in 11 languages and access for those who use American Sign Language. MRC has also translated key forms and informational materials and correspondence letters in its case management system into Spanish, Portuguese, Russian, French Creole, Khmer, Vietnamese, and Mandarin Chinese as outlined in MRC's Language Access Plan.

MRC also has a contract for foreign language translation and MRC has translated key agency documents and VR communication letters working closely with the Bilingual Committee and Employee Resource Groups. MRC also maintains a statewide contract with the Massachusetts Commission for the Deaf and Hard-of-Hearing to secure additional ASL interpreters, CART reporters, and video relay translation as needed. Staff with specific language skills and interpreters are geographically placed to coincide with population and other demographics relating to target consumer groups. MRC also utilizes technology platforms such as Zoom and Microsoft Teams to facilitate communication with consumers. This strategy will continue to be applied and staff with specialized skills added, as appropriate, for the upcoming year and beyond. MRC continues to work on ways to work with staff to further improve coordination of communication needs for individuals served by MRC.

(5) As appropriate, describe the procedures and activities to coordinate the designated State unit's comprehensive system of personnel development with personnel development under the Individuals with Disabilities Education Act.

The information in the *State Plan* pertaining to the RSA requirements for a Comprehensive System of Personnel Development is coordinated and shared with the appropriate State Department of Education unit consistent with the Individual with Disabilities Education Act to assure compliance and coordination of efforts across the Commonwealth of Massachusetts.

COOPERATION, COLLABORATION, AND COORDINATION (Section 101(a)(11) of the Rehabilitation Act)

(j) Coordination with Education Officials. In accordance with the requirements in section 101(a)(11)(D) of the Rehabilitation Act —

- (1) Describe plans, policies, and procedures for coordination between the designated State agency and education officials responsible for the public education of students with disabilities, that are designed to facilitate the transition of the students with disabilities**

from the receipt of educational services in school to the receipt of vocational rehabilitation services, including pre-employment transition services.

The Massachusetts Rehabilitation Commission (MRC) and the Massachusetts Department of Elementary and Secondary Education (DESE) has established interagency cooperation between public education and public vocational rehabilitation agency regarding vocational rehabilitation services pursuant to the Rehabilitation Act of 1973 as amended by the Workforce Innovation and Opportunity Act of 2014 (WIOA) to provide individualized transition services for students with disabilities that lead to successful post-school outcomes in competitive integrated employment, postsecondary education and training, independent living and community participation.

MRC continues to work to increase collaboration with educational officials and has worked with DESE to outline interagency cooperation in a formal agreement entitled “Administrative Advisory on Pre-Employment Transition Services and Transition Services”. MRC has a procedure to review this agreement with DESE and make changes as required.

MRC and DESE have implemented a new version of this agreement signed by the DESE and MRC Commissioners as of February 2024. This new agreement will renew annually unless edits are necessary. MRC and DESE will review the MOU on an ongoing basis to determine if edits are necessary.

MRC maintains updated Pre-ETS policies and procedures and will make further edits to its policies and procedures as needed going forward.

(2) Describe the current status and scope of the formal interagency agreement between the VR agency and the State educational agency. Consistent with the requirements of the formal interagency agreement pursuant to 34 CFR 361.22(b), provide, at a minimum, the following information about the agreement:

- (A) Consultation and technical assistance, which may be provided using alternative means for meeting participation (such as video conferences and conference calls), to assist educational agencies in planning for the transition of students with disabilities from school to post-school activities, including pre-employment transition services and other vocational rehabilitation services;**
- (B) Transition planning by personnel of the designated State agency and educational agency personnel for students with disabilities that facilitates the development and implementation of their individualized education programs (IEPs) under section 614(d) of the Individuals with Disabilities Education Act;**
- (C) The roles and responsibilities, including financial responsibilities, of each agency, including provisions for determining State lead agencies and qualified personnel responsible for transition services and pre-employment transition services;**
- (D) Procedures for outreach to and identification of students with disabilities who need transition services and pre-employment transition services. Outreach to**

- these students should occur as early as possible during the transition planning process and must include, at a minimum, a description of the purpose of the vocational rehabilitation program, eligibility requirements, application procedures, and scope of services that may be provided to eligible individuals;
- (E) Coordination necessary to satisfy documentation requirements set forth in 34 CFR part 397 regarding students and youth with disabilities who are seeking subminimum wage employment; and
 - (F) Assurance that, in accordance with 34 CFR 397.31, neither the SEA nor the local educational agency will enter into a contract or other arrangement with an entity, as defined in 34 CFR 397.5(d), for the purpose of operating a program under which youth with a disability is engaged in work compensated at a subminimum wage.

The purpose of the MOU between MRC and DESE is to establish interagency cooperation between the public education and the public vocational rehabilitation systems so that students with disabilities have access to transition planning and services. The Massachusetts Department of Elementary and Secondary Education (DESE) and the Massachusetts Rehabilitation Commission (MRC) are mutually committed to promoting individualized transition services for students with disabilities that lead to successful post-secondary outcomes in competitive integrated employment, education and training, independent living, and community participation.

DESE is responsible for overseeing local educational agency (LEA) compliance with the Individuals with Disabilities Education Act (IDEA); Section 504 of the federal Rehabilitation Act of 1973; and the Commonwealth's special education law, Chapter 71B of the General Laws. MRC provides comprehensive services to individuals with disabilities to obtain and maintain employment and improve their quality of life and economic self-sufficiency in the community. MRC Vocational Rehabilitation Program is authorized and funded under the Rehabilitation Act of 1973, as amended by the Workforce Innovation and Opportunity Act of 2014, P.L. 113-128 ("WIOA") and helps eligible individuals with disabilities navigate the challenges of the modern workplace. WIOA promotes coordination of services to facilitate the transition of students with disabilities. Students transitioning from receiving special education and related services from school personnel, and pre-employment transition services (Pre-ETS) from MRC, may choose to receive vocational rehabilitation services through the MRC, the designated state agency.

In accordance with the Rehabilitation Act of 1973 as amended by WIOA, nothing in this memorandum will be construed to reduce LEAs' or other agencies obligations under the IDEA (20 U.S.C. 1400 et seq.) to provide or pay for any transition services that are also considered special education or related services and that are necessary for ensuring a free appropriate public education (FAPE) to eligible students with disabilities.

In accordance with IDEA regulations at 34 C.F.R. §300.324(c)(2), nothing in this memorandum relieves MRC of the responsibility to provide or pay for any transition service that the agency would otherwise provide to students with disabilities who meet MRC's eligibility criteria.

DESE and MRC hereby agree to:

1) Maintain ongoing communication and collaboration between DESE and MRC at the state and local level.

Designated staff from DESE and MRC at the state level will maintain ongoing communication, at least annually, to share information about legislative and regulatory changes and to review agency policy initiatives, resources, and other issues related to transition.

The following initiatives will foster local collaboration between MRC staff and LEAs:

Training and Guidance

- DESE and MRC staff at the state level will collaborate on transition training activities for students, families, educators, rehabilitation counselors, and other involved staff, where needed and appropriate.
- DESE and MRC staff at the state level will collaborate, as needed and appropriate, to produce joint guidance on WIOA and local collaboration.

Collaborative Work

- DESE will support and encourage LEAs to provide MRC staff with resources necessary for MRC's work, such as access to meeting and workspace, telephones, and Wi-Fi or wired connection to the Internet, as DESE deems appropriate.
- DESE will support and encourage LEAs to collaborate with MRC staff and assist in obtaining necessary information about students with 504 plans or individualized education programs (IEPs) and their parents/legal guardians in a manner consistent with the applicable laws and regulations. This will facilitate the provision of pre-employment transition services (Pre-ETS) to students who need them, and timely eligibility determination and documentation of vocational rehabilitation activities in the MRC case management system. As appropriate and consistent with applicable student records laws, this information could include student and parent/legal guardian contact information, student assessment data, IEPs, 504 plans, and Transition Planning Forms.
- DESE will support and encourage LEAs to collaborate with MRC to provide career development activities on local and regional levels, as appropriate. These activities could include career fairs, job shadowing, career exploration activities, family resource information sessions, internships, job support and coaching, job-driven trainings/work-based training in collaboration with Career Centers and other organizations.

- MRC will designate staff in Area Offices to work cooperatively with LEAs to coordinate Pre-ETS and transition planning and services, and to disseminate information to parents/legal guardians and students about the MRC transition process as early as the student's 14th birthday.
- MRC will provide consultation and technical assistance, including alternative means for meeting participation (such as video conferences and conference calls), to assist LEAs in planning for the transition of students with disabilities from secondary to post-secondary activities. If a student is eligible for vocational rehabilitation services, this consultation and technical assistance should result in the MRC developing an Individualized Plan for Employment ("IPE") before the student leaves the secondary educational setting and effective implementation of the IPE upon graduation or when the student turns 22 years of age, whichever comes first.

This consultation and technical assistance might include, but is not limited to informational sessions with students, families/legal guardians, and school personnel regarding MRC referral, eligibility, and services, and assigning an MRC point-of-contact for each high school to provide information, receive referrals, and develop IPEs with students.

- DESE and MRC will consider joint grant opportunities for purposes such as promoting collaboration between LEAs, MRC, and community entities; the development of integrated secondary educational to post-secondary systems; and the promotion and statewide dissemination of best practice.

2) Review compliance with state and federal laws and regulations pertaining to transition planning at the local level.

- DESE will provide ongoing guidance to LEAs regarding the responsibility to provide a free and appropriate public education ("FAPE") to students eligible for IEP and Section 504 accommodation plans pursuant to federal and state laws and regulations. Guidance will include the requirements that IEPs detail necessary transition services for each eligible student beginning at age 14, and that representatives of relevant participating agencies be invited to IEP team meetings with prior consent of the special education decisionmaker, and that IEP Teams discuss the transfer of parental rights to the student at least one year before the student turns 18. DESE will also provide guidance to LEAs to facilitate Chapter 688 referrals to the appropriate agency for eligible students who will require ongoing supports and services from the adult service system.
- DESE will monitor LEAs' development and use of policies and procedures, including those regarding Section 504 and the transition requirements of IDEA. All monitoring reports will be made publicly available on the DESE's web site. In accordance with 34 C.F.R. § 397.31, DESE will notify LEAs that WOIA prohibits LEAs from entering into a contract or other arrangement with an entity, as defined in 34 C.F.R. § 397.5(d), for the purpose of operating a program under which a youth with a disability is engaged in

subminimum wage employment. DESE assures that it will not enter such a contract or other arrangement.

- MRC Area Offices will provide outreach to assist local high schools in identifying students with disabilities in need of the MRC services. Outreach should occur to students with disabilities aged 14 to 22 who are receiving IDEA services or who are individuals with disabilities for the purposes of Section 504, as early as possible in the transition process and preferably two years prior to graduation/completion. Outreach to these students must include a description of the purpose of the vocational rehabilitation program, eligibility requirements, application procedures, and the scope of services that may be provided to eligible individuals.
- MRC will ensure that they will determine eligibility for vocational rehabilitation services for students with disabilities and will provide access to Pre-ETS. For those students eligible for vocational rehabilitation services, the rehabilitation counselor, together with the student, will develop an IPE stating the vocational goal and the services necessary to achieve it. These services may include vocational guidance, work evaluation, skills training at a college or community rehabilitation program, adaptive equipment, and benefits counseling. Required Pre-ETS activities are job exploration counseling; work-based learning experiences; counseling on opportunities for enrollment in comprehensive transition or postsecondary educational programs at institutions of higher education; workplace readiness training to develop social skills and independent living; and instruction in self-advocacy, consistent with federal and state regulations.

3) Review and revise forms, procedures, and provide technical assistance to LEAs regarding transition planning in compliance with state and federal laws and regulations.

- DESE will review the effectiveness of the IEP format which integrates transition planning into the form as a whole and will consider revisions as necessary or appropriate. DESE will also consider revisions that might be necessary after any changes in federal or state law. DESE will invite MRC to comment on any proposed changes that affect transition planning.
- DESE and MRC will coordinate, as necessary, to satisfy documentation requirements set forth at 34 C.F.R. §397.10 regarding students and youth with disabilities who are seeking subminimum wage employment.

E. Coordination necessary to satisfy documentation requirements set forth in 34 CFR part 397 regarding students and youth with disabilities who are seeking subminimum wage employment; and

MRC and DESE have coordinated efforts with LEAs to address documentation requirements for students and youth with disabilities who are seeking subminimum wage employment (in accordance with 34 CFR Part 397). MRC has developed documentation forms and has coordinated with DESE to develop and implement a process to ensure these forms are

provided to MRC by LEAs in accordance with these requirements, and subsequently documented in MRC's Section 511 database.

F. Assurance that, in accordance with 34 CFR 397.31, neither the SEA nor the local educational agency will enter into a contract or other arrangement with an entity, as defined in 34 CFR 397.5(d), for the purpose of operating a program under which youth with a disability is engaged in work compensated at a subminimum wage.

The DESE has provided guidance to LEAs, in accordance with 34 CFR 397.31, entitled “Administrative Advisory SPED 2017-1: Guidance Regarding the WIOA Prohibition on Contracting with Entities for the Purpose of Operating a Program Under Which a Youth with a Disability is Engaged in Subminimum Wage Employment” to inform LEAs that WIOA prohibits LEAs from entering into a contract or other arrangement with an entity, as defined in 34 CFR 397.5(d), for the purpose of operating a program under which a youth with a disability is engaged in subminimum wage employment. The DESE assures that it will not enter such a contract or other arrangement.

(k) Coordination with Employers. In accordance with the requirements in section 101(a)(11)(E) of the Rehabilitation Act, describe how the VR agency will work with employers to identify competitive integrated employment and career exploration opportunities in order to facilitate the provision of VR services; and transition services for youth and students with disabilities, including pre-employment transition services for students with disabilities.

MRC's Job Placement Unit operates a robust account management system that is designed for MRC to hear first from employers regarding their specific labor market needs. This gives MRC staff access to job openings that we can assist individuals with disabilities in meeting their employment goals as well as assisting our employer partners by providing them with access to qualified individuals to help fulfill their staffing needs. As part of this system, MRC has several employer advisory boards strategically located across the Commonwealth through which MRC receives labor market information and collaborates on strategies for hiring people with disabilities.

MRC's account management system involves numerous employers across the Commonwealth in a variety of different sectors. There are statewide employer partners as well as local employer partners we work with, including those in STEM occupations such as Spaulding Rehabilitation Hospital, MassGeneral-Brigham, and Red River Technologies, among others.

Many of these partners participate in MRC's employer advisory board meetings. Additionally, as part of MRC's Empower to Employ Program in partnership with the Department of Transitional Assistance (DTA), MRC has hired dedicated Employment Service Specialist staff for this project. The Job Placement unit also works with numerous smaller employers across the Commonwealth to assist with direct job placement of MRC consumers.

MRC produces a labor market summary for the Commonwealth of Massachusetts and analyzes placement and employment trends on an annual basis by Standard Occupational Code. MRC also tracks information on labor force participation and unemployment for people with disabilities in comparison to those without disabilities. MRC continues its efforts to strengthen agency use of labor market information and continues to strive to reduce the gap in labor force participation between people with and without disabilities. Going forward, MRC plans to continue working with its workforce partners, including the MassHire Career Centers and Local Workforce Investment Boards to analyze labor market trends and statistics to identify job sectors to focus outreach efforts on. MRC also uses its Employer Advisory Board network and other marketing efforts to promote MRC's employer services and the benefits of hiring people with disabilities.

Employer feedback has led MRC to operate an annual statewide hiring event to help connect a talent pool with the needs of our employer partners.

MRC also holds regular local office briefings with employers on local labor needs. All of these enhance the agency's knowledge on local and statewide labor market needs. MRC utilizes a data application developed with Symplicity to assist with job matching efforts, resume development, and other related areas to accommodate the needs of our consumers and employer partners.

MRC participates in a business strategy workgroup between key workforce partners as part of the Commonwealth's effort to coordinate services to employers amongst partner agencies. MRC subscribes to the established key principles to guide business services amongst key partner agencies and will continue to work closely with WIOA core partners to expand services to employers.

MRC is continuing to target new employers and expand its account management system. Examples include job driven training programs with multiple employers, such as the MRC Pharmacy Technician Training Program in direct partnership with CVS Health, and a job driven training program with Red River Technologies among others. MRC also is an active member of the Council of State Administrators of Vocational Rehabilitation (CSAVR)'s National Employment Team network, which strives to create a coordinated approach to serving business customers through a national VR team that specialized in employer development, business consulting and corporate relations. The National Employment Network team also comprises the Talent Acquisition Portal providing access to jobs across the country and connects with national employers. MRC works with Cisco to obtain advice and support for employment of individuals with disabilities in the Cybersecurity and technology industries.

MRC's Placement Team also has a very active and vibrant partnership with the Mass PCA Program. This program also offers CNA training and other career options and trainings. These trainings are free to consumers. MRC also works with registered Apprenticeship Programs in the state to secure apprenticeships for consumers. MRC is also working to assist consumers with obtaining career ladder employment in the field of addiction recovery and human services.

Several Job Driven training programs are operated for MRC consumers for jobs in these areas as the agency has identified a significant number of consumers are seeking jobs in the area of human services and/or addiction recovery.

MRC's Job Placement Unit operates an annual Federal Hiring Event in partnership with MCB, and other workforce partners, and the Office of Federal Contract Compliance Programs (OFCCP) in their Boston and Hartford offices to assist consumers with securing competitive employment comparable with their interests and abilities. MRC prepares consumers to interview for available jobs with employers participating in the event. This is a hiring event that focuses on direct job placement with participating employers. It differs from a career fair because consumers must apply for at least one job for which they are qualified to be eligible to participate. Employers are motivated to hire because they are presented with a set of diverse, qualified individuals from whom they can select to fill vacancies. In 2023, MRC completed its 11th annual Hiring Event. Since 2013, Over 610 individuals have been successfully employed across the Commonwealth through participating in this annual one-day event. The aggregate annual wages of all successfully employed consumers through the hiring event since 2013 is approximately \$14.2 million. Consumers have been employed in a variety of occupations ranging from office and administrative support, health care, protective service, human services, and management occupations, amongst others.

Job-Driven Trainings:

MRC is committed to the use of industry-based training to assist its consumers in finding competitive employment opportunities through employer engagement focused on jobs and career pathways leading to higher wages and hours worked. MRC has hired a Director of Workforce Talent Development to assist with these efforts. Over the past 10 years, MRC has conducted over 1,200 OJTs with employers and approximately 600 consumers have completed Job-Driven trainings with MRC employer partners.

MRC continues to develop and utilize Job-Driven Trainings (JDT) and on-the-job (OJT) training and evaluations. MRC has created job driven training programs to date with CVS Health, multiple human services organizations including customized JDT's for Substance Use Disorders amongst other employers. In addition, MRC holds job-driven trainings for human service and IT jobs. MRC continues its cyber security job-driven training program partnership with CISCO Academy and has developed job-driven training partnerships with both Holyoke and Roxbury Community College. MRC has also developed a data analytics job driven training program and has developed a partnership with Amazon. MRC has found that the employment rate (rate of successful outcomes in employment to unsuccessful case closures) is very high for consumers who participate in an OJT or JDT. Over the past 3 fiscal years, the employment rate for those participating in JDTs and OJTs was 77% and 79% respectively.

MRC has found that many consumers who participate in an OJT or Job-Driven training obtain employment with the OJT or JDT. Other participants are able to obtain employment elsewhere as a result of their participation in the OJT or JDT because they gained recent work experience and/or developed job-specific skills.

MRC also holds annual employer trainings to strengthen relationships with existing employers and to develop new ones. These trainings promote MRC's employment services to employers, encouraging employer partners of MRC to promote the hiring of people with disabilities to other employers and reducing stigmas related to employment of people with disabilities. All the activities mentioned in this section provide guidance for the delivery of best practices for the employment of individuals with disabilities with employers of various sizes across the Commonwealth of Massachusetts.

MRC continues to work with employers to coordinate transition services, including Pre-Employment Transition Services (Pre-ETS) for students and youths with disabilities across the Commonwealth of Massachusetts, in partnership with its contracted Pre-ETS vendors

Through its Pre-ETS vendors, MRC offers internship opportunities for high school students with disabilities in partnership with employers across the Commonwealth as part of its Pre-ETS programming.

In addition, MRC staff coordinate with MRC Pre-ETS providers and with employers to provide work experiences such as internships and job tours for students and youths with disabilities receiving VR and/or Pre-Employment Transition Services through MRC. These services provide work-based learning experiences and workplace readiness training. It also provides valuable work experience and mentorship opportunities for participants.

(I) Interagency Cooperation with Other Agencies. In accordance with the requirements in section 101(a)(11)(C) and (K), describe interagency cooperation with and utilization of the services and facilities of agencies and programs that are **not** carrying out activities through the statewide workforce development system to develop opportunities for community-based employment in integrated settings, to the greatest extent practicable for the following:

(1) State programs (designate lead agency(ies) and implementing entity(ies)) carried out under section 4 of the Assistive Technology Act of 1998;

The Massachusetts Rehabilitation Commission is the Lead Agency and operator of MassMATCH, the state's Assistive Technology Act program funded under Section 4 of the Assistive Technology Act. The MRC VR program and MRC area offices have excellent relationships with the MassMATCH Program and its partners across the state who together provide a broad range of Assistive Technology (AT) services to the public. MassMATCH's AT offerings include comprehensive information and referral as well as technical assistance services, device demonstration and loan program that provides a chance to borrow and try devices for free, a device reuse program, and an Alternative Financing Program that provides zero percent and low-interest loans to consumers when other resources are not available to purchase needed adaptive technology. These programs are available to MRC VR consumers.

In the last 1.5 years, the MassMATCH Program has also overseen the implementation of a variety of ARPA funded assistive technology initiatives. These include activities to provide AT devices and the associated AT services that are often needed to ensure successful use of the technology. The goals are to ensure access to and improve proficiency in the use of a wide range of assistive technologies, and to ensure increased independence and reduce isolation among individuals with disabilities across the Commonwealth. Another aspect of the ARPA funded activities is to provide educational opportunities to AT and other professionals as well as caregivers to increase the pool of people available to assist or support consumers in their use of technology.

(2) Programs carried out by the Under Secretary for Rural Development of the Department of Agriculture;

There are no programs in Massachusetts carried out by the Under Secretary for Rural Development of the U.S. Department of Agriculture.

(3) Non-educational agencies serving out-of-school youth;

MRC does not have any formal cooperative agreements in place with noneducational agencies serving out-of-school youth. The Massachusetts Rehabilitation Commission further collaborates with organizations that provide services, in whole or in part, to specific constituencies, including out of school youth. Among such organizations are the Massachusetts Association of Financial Aid Administrators, the Massachusetts Developmental Disabilities Council, the Arthritis Foundation, the Massachusetts Multiple Sclerosis Society, the Massachusetts Easter Seals, United Cerebral Palsy, the Brain Injury Association of Massachusetts, the Epilepsy Association, and the Asperger/Autism Network (AANE). These collaborations may be informal or may include service contracts. The purpose, goals, and actions established in these contracts are very similar to the agendas set forth in interagency collaboration.

(4) State use contracting programs;

The Commonwealth operates a Supplier Diversity Program including the following categories: Minority (MBE), Women (WBE), Service—Disabled Veteran (SDVOBE), Veteran (VBE), Lesbian, Gay, Bisexual and Transgender Business Enterprises (LGBTBE); and Disability—Owned Business Enterprises (DOBE). MRC participates in this program as part of statewide contracting as an equal opportunity initiative.

(5) State agency responsible for administering the State Medicaid plan under title XIX of the Social Security Act (42 U.S.C. 1396 et seq.)

MRC and the Executive Office of Health and Human Services, Office of Medicaid, the state agency responsible for administering the state's Medicaid program have a well-established and long-standing relationship. MRC and the EOHHS' Office of Medicaid are committed to the

promotion of independence and self-sufficiency through access to Home and Community-Based Services (HCBS) services for individuals with disabilities.

MRC and the Office of Medicaid have developed and signed a Cooperative Agreement to work collaboratively to promote the provision of services and long-term supports for individuals with disabilities who require such services to obtain and maintain competitive employment in accordance with Workforce Innovation and Opportunity Act (WIOA). MRC and the Office of Medicaid have renewed this agreement with no modifications with new signatures for the current Commissioner and Medicaid Director as of December 2023.

This Cooperative Agreement is in accordance with Section 412(a)(7)(H) of the Workforce Innovation and Opportunity Act, which requires a state's VR agency to have a formal cooperative agreement with the state's Medicaid agency with respect to the delivery of VR services for individuals who have been determined to be eligible for Home and Community-Based Services (HCBS) under a Medicaid HCBS waiver.

MRC and EOHHS' Office of Medicaid, through joint planning and sharing of information, will collaborate to promote access to competitive integrated employment and will work to increase the number of successful employment outcomes for individuals with disabilities needing, and eligible to receive, long-term supports to find and keep a job.

MRC provides the following services to individuals who apply for and are determined eligible for VR services, based on individual needs:

1. vocational assessment
2. vocational counseling and guidance
3. funds for training/education, job placement
4. follow-up supports after training.

EOHHS through its Office of Medicaid administers, and MRC serves as the Operating Agency for, certain HCBS Waivers through which individuals with disabilities may receive long term services and supports in the community. The availability of such supports works to enable individuals with disabilities to achieve independence and economic self-sufficiency in the community. Many individuals receiving VR services from MRC are also enrolled in Mass Health (the state Medicaid program) and through Mass Health are supported in their efforts to live and work as independently as possible in the community.

Through participation in one of *MassHealth's HCBS waivers* and/or utilization of *MassHealth State Plan* services, disabled MassHealth members may receive services that support their efforts to obtain competitive integrated employment. These services may include, as appropriate:

1. Community Living Supports: A range of *MassHealth State Plan* and *HCBS Waiver* services that enable an individual to live in the community as an alternative to institutional care and which may include such services as home health aide, homemaker services,

individualized home supports, independent living supports, home/environmental accessibility modifications, and personal care.

2. Pre-vocational Services: A range of learning and experiential type activities that prepare an individual for paid or unpaid employment in an integrated, community setting. Services may include teaching such concepts as attendance, task completion, problem solving and safety as well as social skills training, improving attention span and developing or improving motor skills.

Additionally, the following services may be available to eligible individuals receiving VR services from MRC or who are enrolled in a *MassHealth HCBS waiver*, subject to the rules and regulations governing each program:

1. Vehicle Modification
2. Transportation
3. Home/environmental accessibility modification
4. Supported Employment Services

Designated MRC and EOHHS Office of Medicaid staff will communicate on an ongoing basis to share information about legislative and regulatory changes and to review agency policy initiatives, resources, and other issues related to long term supports for mutual consumers under a *MassHealth HCBS waiver* program.

(6) State agency responsible for providing services for individuals with developmental disabilities;

MRC and the Department of Developmental Services (DDS) work collaboratively to assist individuals with developmental disabilities across the Commonwealth of Massachusetts. In November 2023, MRC and DDS signed a revised *Memorandum of Agreement (MOA)* to work collaboratively through joint planning and sharing of resources to expand access to integrated employment services to increase the number of successful job placements for individuals with intellectual disabilities, especially those of transition age who have a goal of competitive employment.

MRC and DDS may from time to time suggest amendments and modifications of all or part of the provisions hereunder if it determines that it would be in its best interests in fulfilling the purposes of this *MOA*. The *MOA* is effective as of the date signed by both Agencies (11/3/2023) and shall remain in effect for two (2) years, unless amended pursuant to Section 10 herein or terminated by one of the Agencies through written notice to the other agency 90 days in advance of the anticipated termination date.

The MRC-DDS *MOA* will be reviewed annually by the leadership of both agencies to identify areas for further clarification and improvement in order to further promote competitive integrated employment for individuals with intellectual and developmental disabilities.

Shared Vision

MRC and DDS share a common vision and goal to increase competitive integrated employment opportunities for people who are eligible for DDS services, acknowledging that competitive integrated employment includes supported employment, customized employment, and supported self-employment. Employment provides a pathway to independence, financial well-being, dignity, and inclusion. This agreement is based on the view that people with disabilities, including those with intellectual and developmental disabilities, should have access to the services and supports necessary to assist them in obtaining and maintaining competitive integrated employment. Self-determination and informed choice are principles we seek to have embedded in these services and supports.

Purpose and Principles

Consistent with the *DDS Employment First Policy* and the Workforce Innovation and Opportunity Act (WIOA), the purpose of this MOA is to outline mutual goals, actions, and responsibilities to increase the opportunities and success of working age adults served by DDS to achieve and sustain competitive integrated employment. This MOA is meant to provide a framework for the joint work of the two agencies. This work shall be guided by the following principles:

- Person centered approaches will be embedded in our work together to help people move toward meaningful work that builds on unique interests, strengths, and talents.
- Collaboration will lead to a coordinated system of services and supports that includes consistent communication and training to support implementation that leads to employment outcomes.
- Simplicity will lead to a system that is easier for stakeholders to understand, navigate and implement.
- Resources will be used efficiently and within the bounds of state and federal guidelines and regulations.
- Continuous quality improvement will guide our efforts to improve outcomes and will be informed by data and input from stakeholders.

Goals

The goals of the MRC-DDS MOA are to:

1. Provide a foundation for the development and implementation of policies and procedures that lead to a seamless and coordinated approach to referral, eligibility determination, service planning and delivery.
2. Provide individuals eligible for DDS services with quality employment services that lead to competitive integrated employment in a non-duplicative and seamless manner.

3. Describe a mechanism for DDS and MRC oversight, collaboration, and continuous quality improvement.

Definitions

Competitive integrated employment

Individuals are hired on a full or part time basis and compensated by the business at minimum wage or higher. Wages and benefits are similar to those without disabilities performing the same work and the individual is fully integrated with co-workers without disabilities.

Customized employment

Competitive integrated employment for an individual with a significant disability, based on an individualized determination of the strengths, needs and interests of the individual and the business needs of the employer and carried out through flexible strategies.

Employment First

Employment First means that employment in the general workforce should be the first and preferred option for individuals with disabilities receiving assistance from publicly funded systems.

Long term supports

Long term supports, which may also be referred to as ongoing or extended supports, refer to those services and supports that may be needed on an ongoing basis in order for the person served to maintain employment. Long term supports are provided after vocational rehabilitation (“VR”) case closures and may compliment or enhance natural supports in the workplace.

Pre-employment transition services

Pre employment transition services are provided to students with disabilities age 14 through 21 currently enrolled in an education program who are presumed to be eligible for MRC vocational rehabilitation services. These services are designed to increase the student’s awareness of the world of work and to explore their interests, skills, and support needs; provide exposure to work experience and prepare students for employment and post-secondary education. The services are intended to complement services students are receiving in school.

Section 511

Section 511 of the Rehabilitation Act places limitations on the payment of subminimum wage by entities holding special wage certificates under Section 14(c) of the Fair Labor Standards Act. The purpose of Section 511 is to ensure that individuals with disabilities have access to information and services to enable them to obtain competitive integrated employment. Section 511 includes specific requirements for youth as well as for state VR agencies, entities that hold 14(c) certificates and state education agencies. It is important to note that DDS has

committed to no longer supporting programs that pay individuals subminimum wage after 2024.

Shared job seekers

Shared job seekers are those individuals who are receiving services from both MRC and DDS. This term may also apply to those individuals' receiving services from one agency and applying for eligibility through the other.

Successful case closure

A successful case closure occurs when an individual has obtained and is stable in a job consistent with their goal. Closure may occur any time after the individual has been on the job for 90 days.

Successful employment outcome

A successful employment outcome occurs when a person being supported by MRC obtains and maintains a job that is consistent with their employment goal for a minimum of 90 days.

Supported employment

Competitive integrated employment with ongoing supports for job retention.

Responsibilities

1. MRC and DDS agree to establishing a system of supports that assures the following outcomes:
 - a. Develop protocols to streamline the eligibility and referral process for individuals already determined eligible for DDS services who are seeking services from MRC.
 - b. Develop protocols for serving common job seekers to ensure that services are provided in an integrated manner, which avoids duplication.
 - c. Work collaboratively to support policies and initiatives that promote employment supports and outcomes for individuals with IDD including efforts to decrease reliance on a subminimum wage.
 - d. There will be regular communication between MRC and DDS local area staff to facilitate collaboration, joint planning for service delivery, and cross agency information sharing and training to ensure that all parties have current information about agency policies and practices including those related to referral, eligibility requirements, and other pertinent information.
 - e. MRC and DDS will work collaboratively to support access to pre-employment transition services as well as other supports that may support transition aged youth and young adults served by DDS on a pathway to employment.

- f. Develop and update operational guidance to support the implementation of this MOA as needed.
 - g. Collaborate on the development and use of training and resource materials to support implementation of the MOA at the local level.
 - h. Work together to identify opportunities for coordinated engagement with the provider network and as needed engage in efforts to build the capacity of the provider network to provide quality employment supports for individuals served by DDS.
 - i. Work together to identify funding options for long term, ongoing supports when the need is anticipated and insure timely and smooth transition to those long term, ongoing supports.
 - j. The provision of needed services/resources by both MRC and DDS will be subject to the availability of funding.
 - k. MRC and DDS will work together to develop data sharing authority and to use this authority to improve coordinated services for shared job seekers.
2. The Massachusetts Rehabilitation Commission agrees to the following responsibilities:
- a. MRC will provide vocational rehabilitation services for any individuals served by DDS determined eligible for MRC services, including but not limited to supported employment, subject to the availability of funding.
 - b. MRC will work collaboratively with DDS service coordinators to provide services in a coordinated manner and to facilitate planning for those individuals who may need ongoing supports after MRC case closure.
 - c. MRC, as the designated state unit, must ensure that prior to any approval for an individual to seek subminimum wage employment, all obligations required under 34 CFR §397 are met in accordance with Section 511 of the WIOA. MRC acknowledges that DDS is phasing out the use of subminimum wage and will work collaboratively with DDS to support the development of service plans that assist people on a pathway to competitive integrated employment whenever possible. Effective September 30, 2024, DDS will not fund services that support employment at subminimum wage. however MRC is required to keep these procedures in place under Section 511 of the WIOA.
 - d. MRC will support counselors and providers to participate in training and other professional development opportunities intended to support the development of knowledge and skills that will enhance their ability to provide VR services for those served by DDS.
3. The Department of Developmental Services agrees to the following responsibilities:

- a. DDS will facilitate referrals to MRC for individuals who want to obtain competitive integrated employment, including supported employment.
- b. DDS, in partnership with other service providers, will make referrals and/or provide referral information to MRC that includes information about an individual's interests, skills, and support needs as well as documentation of disability and other relevant clinical information, but only to the extent authorized by the individual and/or the individual's guardian.
- c. DDS will provide services that support individuals on a pathway to employment, including community-based day support services and group supported employment, and may continue to provide these services while VR services are underway to the extent that it is determined appropriate by the individual and their team, and to the extent that funding is available.
- d. DDS is committed to providing long term employment supports for those individuals eligible for DDS services who, through MRC, obtain competitive integrated employment and need ongoing supports to maintain employment, contingent on the availability of funding.
- e. DDS will support service coordinators and other DDS staff to participate in training and other professional development opportunities intended to support the development of knowledge and skills that will enhance their ability to support employment and the goals of this MOA.

Referrals, eligibility, and service delivery

1. DDS eligible individuals referred to MRC should have a goal of competitive integrated employment, including supported, customized and self-employment. This includes individuals who may need long-term, ongoing support to successfully maintain employment.
2. Referrals of DDS eligible individuals to MRC may come from a number of sources including DDS Transition and Service Coordinators, providers, schools, individuals, and family members. When referrals come from a source other than DDS, MRC will, with consent from the job seeker and/or guardian, notify DDS of the referral.
3. Individuals who have been determined eligible for adult services by DDS are understood to have a disability and the DDS eligibility letter or Individual Support Plan shall provide sufficient documentation of disability. Additional information may be required to support the development of an individual plan for employment (IPE).
4. To facilitate timely plan development and avoid duplication of services, the referring entity should provide as much information as possible through shared files and records, and discussion with the service coordinator and current providers related to the individual's interests, skills, experiences, and support needs. This may include a person-centered career plan or positive personal profile, and a resume or portfolio when available.

5. Once MRC eligibility is determined, an integrated team approach will be used to promote effective service delivery for shared job seekers. The integrated team may, with permission of the job seeker include the job seeker, MRC counselor, DDS service coordinator, current service providers, family members and others as appropriate.
6. Benefits information and planning is considered an essential service and should be provided as early as possible so that the individual's financial considerations are integrated into plan development.
7. Individuals referred to MRC may also receive services from DDS as long as those services are complementary and not duplicative to those provided by MRC.
8. For those individuals who may require ongoing support once successfully placed and stabilized in a job, MRC and DDS will work together to identify the need and plan for long term services to support job retention. Planning for long term supports should begin early in the employment process in order to identify funding options for these services and to insure a smooth transition upon MRC case closure.
9. Individuals served by DDS may receive MRC funded extended supports when DDS funding is not available, subject to the availability of MRC funding. DDS shall complete a periodic review, at least quarterly, of funding availability through DDS for those receiving MRC funded extended supports.
10. MRC will work collaboratively with DDS to support individuals who may need additional services and supports to progress towards their employment goal. Should an individual's case be closed without an employment outcome, MRC will work with DDS to develop a plan for alternative services.

Confidentiality, release of information, and data sharing

When sharing personal information both agencies will follow state and federal laws, policies, and procedures regarding the protection, use and release of personal information, including but not limited to photographs and lists of names. Personal information will be released only as needed for program purposes and only upon receiving informed consent from the person (or person's guardian or another legal representative, if relevant). Any further disclosure of personal identifiable information shall be consistent with all applicable Federal and State laws and regulations, including, but not limited to, M.G.L. c. 123B, § 17; M.G.L. c. 6 §84; 34 CFR; 361.38; 107 CMR 2.00; 115 CMR 4.05: Confidentiality of Records and 4.06: Access to Records and Record Privacy; and the Health Insurance Portability and Accountability Act of 1996 (HIPAA Privacy Rule) (45 CFR Part 160 and Part 164, Subpart E).

MOA implementation and oversight

Together MRC and DDS will establish a Steering Committee that will meet at least quarterly to support implementation of this MOA and accompanying implementation guidance. The Steering Committee will be responsible for modifying the Implementation Guidance as needed to ensure that it supports the intent of this MOA. The Steering Committee will also identify

training and technical assistance that is needed at the local level to support the implementation of this MOA.

(7) State agency responsible for providing mental health services;

The Massachusetts Rehabilitation Commission (MRC) and the Department of Mental Health (DMH) both recognize that employment is essential to the independence, dignity, and recovery of persons with serious mental illness and continue to work collaboratively to increase employment opportunities and positive employment outcomes for the individuals they mutually serve. Through enhanced interagency communications throughout their organizational structure, engaging in joint service planning at the individual and program levels, and formalizing a plan for ongoing collaboration, MRC and DMH are working collaboratively to coordinate and improve services to shared consumers to assist them in their efforts to obtain employment and live independently in the community.

MRC and DMH have developed a *Memorandum of Understanding* to guide efforts to work collaboratively to identify the individuals that they mutually serve through implementing an ongoing data collection system, to foster joint service planning and interagency training to increase employment opportunities and positive employment outcomes for individuals with severe mental illness. The MOU will be revised as needed. In addition, MRC coordinates employment services for individuals with mental health needs served by the Department of Mental Health's Adult Clinical Community Services (ACCS) program in collaboration with DMH and its vendors. This initially was through an Interagency Service Agreement (ISA) between MRC and DMH, but now the funding is directly provided to MRC. MRC has also entered into Business Associate Agreement (BAA) with DMH and its providers for coordinating MRC ACCS program services.

The MRC/DMH Employment Initiative is designed to build an integrated employment framework that inspires and engages innovation to ensure full employment for people with mental health needs at the same rate of employment as the general population. The focus of this initiative is on individuals served by DMH through Adult Community Clinical Services (ACCS). These individuals are being referred to MRC for Vocational Rehabilitation Employment Services. To serve these individuals, MRC is using an Integrated Resource Team approach, where partner agencies and supports come together to craft and jointly own a job seeker's employment goal, to coordinate wrap-around services and ongoing collaboration and communication. MRC has hired dedicated staff with funding through the ISA to work with ACCS referrals. These counselors will have smaller caseloads and will work with CIES providers, DMH providers, DMH, and other MRC staff to rapidly engage with consumers, develop a plan for employment, and coordinate services designed to assist these consumers in achieving successful employment outcomes.

MRC recently completed its 5th year of this program and has seen much success with this program, including decreased timeframe to complete eligibility and IPEs, improved rates for successful employment outcomes, and reduction in unsuccessful closures, particularly prior to

eligibility and after service delivery. MRC will continue to closely evaluate program performance going forward. MRC is focusing on trying to increase wages and hours for consumers participating in this program into higher wage occupational areas and into occupations with career pathways going forward.

The *MOU* outlines collaboration between MRC and DMH as follows:

1. Through the *MOU* and through the ACCS initiative, MRC and DMH have developed a system for ongoing collaboration and communication at the local and state level.
2. MRC and DMH continue to work on ways to enhance systems to regularly identify the individuals they mutually serve, in general and for the ACCS initiative.
3. MRC and DMH continue to implement processes that will facilitate DMH and MRC timely referring to each other individuals who could benefit from receiving both MRC and DMH services, including consumers to be referred to MRC for MRC ACCS services.
4. MRC and DMH continue to develop and implement a process for conducting joint-service planning for individuals mutually served by both agencies to enhance the individuals' employment opportunities. For consumers participating in the ACCS initiative, the Integrated Resource Team approach is used to develop and coordinate services, including wrap around services.
5. To promote referrals, consultations regarding referrals and joint-service planning when appropriate, MRC and DMH will continue to ensure that all staff at both agencies and service provider staff are informed and trained on the services the respective agencies provide.
6. MRC and DMH have implemented an ongoing data sharing agreement to track employment service delivery and the outcomes associated with mutually served individuals and to help the Agencies assess the effectiveness of their collaboration. Additionally, the ISA for the ACCS initiative outlines key performance indicators and data collection areas for track services and outcomes for the new MRC-DMH Employment Initiative. These indicators are used to track outcomes and improve services and are reported out on a monthly basis and broken down to the MRC Office and DMH site level.
7. Continue to explore, develop, and implement further joint initiatives beneficial to the individuals mutually served by the Agencies, including but not limited to the pursuit of new resources.
8. Consumer Input. MRC and DMH acknowledge the importance of consumer input and incorporate such input in the evaluation of their collaborative efforts.

Local Liaisons/Training/Joint Service Planning:

1. Each DMH Site Office, DMH facility, and MRC Area Office will designate a liaison(s) to serve as a central point of contact and resource for the other Agency.

The liaison will:

1. Provide their counterparts with information about and answer questions regarding their Agency's eligibility or referral process and the services they provide.
2. Provide guidance to and/or confer with their counterparts, or designees, about the appropriateness of referring a specific individual served by one of the Agencies to the other for additional services; and when appropriate, helping to facilitate the filing and processing of the required application or referral forms.

Referrals between agencies:

MRC and DMH have agreed:

Referrals to MRC from DMH shall be made in good faith with the reasonable expectation that the person referred is interested in competitive, integrated employment, has the potential to benefit from vocational rehabilitation services, including supported employment services, in order to achieve competitive employment.

Referrals to DMH from MRC shall be made in good faith with the reasonable expectation that the person referred is interested in, and in need of the services DMH offers, and is likely to meet criteria for DMH services.

MRC and DMH have agreed to mutually facilitate the coordination of employment related services provided by DMH, MRC or contracted providers to individuals mutually served by the Agencies; assist in resolving issues that may arise regarding an application for services, a referral for services and/or the coordination of care; notify or ensure notification to their counterpart/and/or the referral source as to the outcome of an application or referral filed on behalf of an individual being served by the other agency; and ensure that the agencies MOU contact persons have updated contact information for them.

Training: As part of the partnership, MRC and DMH continue to conduct ongoing training on best practices, collaborative efforts, and ACCS employment initiative

Joint Service Planning:

At the State Level: DMH and MRC operate a workgroup staffed by both agencies and contracted providers, as applicable, to establish protocols for the Agencies that will ensure that the care of mutually served individuals in need of enhanced support to obtain or retain competitive employment will be coordinated to the extent practical and feasible. MRC and DMH also work closely together on the state level on the MRC-DMH ACCS Employment Initiative. At the Regional Level, each DMH Area Director and MRC District Director or their designee, meet with their counterparts regularly to discuss the new MRC-DMH Employment Initiative, any communication or collaboration issues, and to address opportunities for additional collaborations.

At the Local Level: DMH Site Directors and MRC Area Directors, Supervisors, and MRC ACCS counselors ensure that regular and as needed communications occur between MRC and DMH

to facilitate collaboration on the MRC-DMH Employment Initiative and other efforts, joint planning for service delivery, and cross agency information sharing.

(8) Other Federal, State, and local agencies and programs outside the workforce development system; and

MRC does not have any formal cooperative agreements in place with State and Federal agencies outside of the statewide workforce development system.

The Massachusetts Rehabilitation Commission considers cooperation and collaboration with other agencies to be essential and beneficial to effectively serve people with disabilities and to assist individuals with opportunities for employment based on their choices, needs, interests, and preferences. Other agencies provide critical supports, necessary resources, and dedicated human service professionals all of which amplify and enhance the Vocational Rehabilitation Program. For many years, the Massachusetts Rehabilitation Commission has worked closely and cooperatively with the staff of other agencies in serving mutual consumers. Collaboration often extends well beyond services to individuals. The Massachusetts Rehabilitation Commission works with other agencies to:

- Affect system change
- Increase resources, funding, and service options
- Improve communication and mutual understanding among staff
- Change public attitude toward issues of disability
- Achieve common goals on behalf of those whom the agencies serve
- Enhance services for mutually served consumers to assist them in achieving their employment and independent living goals.
- Seek to improve quality of life and financial self-sufficiency through employment in higher wage occupations and career opportunities with advancement opportunities.

Agencies with which such collaboration has occurred and has remained active locally and at the Statewide level include, the Executive Office of Health and Human Services, the Massachusetts Commission for the Blind, the Massachusetts Commission for the Deaf and Hard-of-Hearing, the Department of Mental Health, the Department of Developmental Services, the Social Security Administration, the Massachusetts Autism Commission, Medicaid/Mass Health, Department of Public Health, the Department of Transitional Assistance, the Executive Office of Labor and Workforce Development, Adult and Community Learning Services, the Department of Elementary and Secondary Education, Community Colleges across the Commonwealth (such as Roxbury and Holyoke Community Colleges), as well as the Department of Correction and Department of Youth Services through MRC's Supported Employment Programs.

With the Department of Transitional Assistance (DTA), MRC and DTA operate a program called Empower to Employ. The goal of this program is to establish an integrated employment model for individuals with disabilities receiving TANF benefits. This partnership provides resources to assist shared participants living with disabilities to be independent through employment. The partner agencies use a jointly funded model of client engagement and intensive co-case

management to provide individualized and meaningful services. Through this collaborative effort, DTA and MRC are utilizing an Integrated Resource Team (IRT) approach to facilitate recruitment (pre-engagement), engagement, service delivery and placement. The IRT informed approach includes:

- Individual and group outreach to recruit and refer participants who are a strong match for Empower to Employ and MRC VR services;
- Client-centered assessments that identify goals that are most meaningful to the participant, focus on the whole family, and tap into what motivates participants to achieve their goals;
- Flexibility to meet participants where they are and creativity in addressing challenges as they arise;
- Enrollment into specified training or vocational rehabilitation services to support the goals set with the participant during assessment; and
- Continuous co-case management between MRC and DTA teams that bolsters participant engagement and re-engagement, when necessary, and empowers them to navigate their pathway to economic stability.

(9) Other private nonprofit organizations.

The Massachusetts Rehabilitation Commission does not have any formal cooperative agreements with private non-profit organizations. MRC does work closely with nonprofits across the Commonwealth.

MRC has for many years worked in partnership with private nonprofit Community Rehabilitation Providers (CRPs) to develop a wide array of programs and services to assist people with disabilities to achieve suitable employment outcomes. The MRC and CRPs have collaborated to develop programs including Vocational Services; Competitive Integrated Employment Services (CIES), contracted Pre-Employment Transition Service programs (Pre-ETS), and a wide array of support services essential in vocational rehabilitation.

MRC's collaborative relationship with its CRP partners have been achieved through open communication, sharing of ideas and resources, mutual support and understanding and inclusiveness of all partners in the development of and implementation of service design.

The MRC develops programs and services with the participation of providers in several forums as described below:

1. Statewide Rehabilitation Council that meets quarterly.
2. Meetings with representatives of the Executive Committee of the Massachusetts Council of Human Service Providers and other Community provider trade groups.
3. Periodic district wide meetings with community rehabilitation programs.
4. Interagency and cross—disability agency councils.

5. Task specific work teams.

MRC contracts with Qualified Community Rehabilitation Providers (CRPs) as part of the Competitive Integrated Employment Service (CIES) program and to also provide Pre-Employment Transition Services (Pre-ETS).

The CIES program is a procurement of a set of contracted services available for all individuals with disabilities served by the MRC Vocational Rehabilitation Program. Qualified CRPs provide the services to MRC consumers. The MRC/CIES procurement program provides employment services for VR participants, and additionally through State funding the availability for extended ongoing supports after closure. CIES comprises six service components, each associated with a specific service outcome. Specific service components are provided to consumers based on their individualized needs. Through the component-based service delivery system, consumers can receive the comprehensive individualized services and supports they need to achieve and maintain successful employment. CIES services may carry over from year to year depending on the needs of the individual consumer and consumers may receive any number of components based on their needs and interests. CIES is often used to assist individuals with complex disabilities or situations into integrated employment opportunities with competitive wages paid by an employer.

CIES procurement service components include Career Exploration and Engagement; Employment-Based Skills Training/Work Experiences; Job Development and Placement; Initial Employment Support services, Interim Flexible Supports (including peer support and job coaching), and Ongoing Employment Support services.

Providers are paid on a performance basis during the initiation and completion phases of services. Using a data management and billing system called EIM (Enterprise Invoice Management), and internal tracking, the MRC Business Improvement Partners, track program enrollment, expenditure, and outcomes.

MRC has adjusted the CIES model based on lessons learned and input from its staff, CRP partners, and other stakeholders, such as adding Business Improvement Partners to assist with managing performance and provide assistance to MRC staff and providers to ensure the program is best meeting the needs of MRC and its consumers. These adjustments are designed to improve the effectiveness and efficiency of CIES services for MRC consumers. MRC also incorporated peer support and flexible supports into the CIES procurement and has developed key performance indicators for CIES and CIES-ACCS. The CIES procurement is set to be a rolling RFR which opens four times a year to allow recruitment of additional vendors providing flexibility and maximum access for services.

MRC continues to work closely with CRPs on a collaborative effort with the Department of Mental Health (DMH) to provide contracted employment services as a part of the CIES procurement program for consumers participating in the Department of Mental Health's Adult Community Clinical Services (ACCS) model. As part of MRC ACCS services through the CIES

procurement program, MRC has entered into Business Associate Agreements (BAAs) with CIES ACCS providers to assist with facilitating and coordinating services between MRC, DMH, and providers for participating consumers.

MRC also works with CRPs and other nonprofits such as the Independent Living Centers through its Pre-Employment Transition Service (Pre-ETS) contracts. These contracts provide work-based learning experiences, workplace readiness training, job exploration counseling, instruction in self-advocacy/peer mentoring, and counseling on enrollment in post-secondary education. MRC's Pre-ETS procurement is designed to allow MRC to provide students with exposure to the world of work. This approach focuses on: 1) increasing the student's awareness of the world of work and their own employment interests, skills, and needs; 2) providing exploration and exposure opportunities related to work experiences; and 3) better preparing students for employment and postsecondary success. This approach is tiered to ensure that students of all abilities can access and engage in Pre-ETS services based on their interests and needs. MRC is seeking to move towards a unit rate structure for its Pre-ETS contracts going forward to improve the quality of services provided to students and to assist with improved evaluation of the program.

VOCATIONAL REHABILITATION CERTIFICATIONS AND ASSURANCES

CERTIFICATIONS

States must provide written and signed certifications that:	
1.	The Massachusetts Rehabilitation Commission is authorized to submit the VR services portion of the <i>Unified or Combined State Plan</i> under title I of the Rehabilitation Act of 1973 (Rehabilitation Act), as amended by title IV of WIOA, ⁶ and its State Plan supplement under title VI of the Rehabilitation Act;
2.	In the event the designated State agency is not primarily concerned with vocational and other rehabilitation of individuals with disabilities, the designated State agency must include a designated State unit for the VR program (Section 101(a)(2)(B)(ii) of the Rehabilitation Act). As a condition for the receipt of Federal funds under title I of the Rehabilitation Act for the provision of VR services, the Massachusetts Rehabilitation Commission ⁷ agrees to operate and is responsible for the administration of the State VR Services Program in accordance with the VR services portion of the <i>Unified or Combined State Plan</i> , ⁸ the Rehabilitation Act, 34 CFR 361.13(b) and (c), and all applicable regulations ⁹ , policies, and procedures established by the Secretary of Education. Funds made available to States under

⁶ Public Law 113-128.

⁷ All references in this plan to "designated State agency" or to "the State agency" relate to the agency identified in this paragraph.

⁸ No funds under title I of the Rehabilitation Act may be awarded without an approved VR services portion of the *Unified or Combined State Plan* in accordance with section 101(a) of the Rehabilitation Act.

⁹ Applicable regulations, in part, include the Education Department General Administrative Regulations (EDGAR) in 34 CFR parts 76, 77, 79, 81, and 82; 2 CFR part 200 as adopted by 2 CFR part 3474; and the State VR Services program regulations at 34 CFR part 361.

States must provide written and signed certifications that:	
	section 111(a) of the Rehabilitation Act are used solely for the provision of VR services and the administration of the VR services portion of the <i>Unified or Combined State Plan</i> ;
3.	As a condition for the receipt of Federal funds under title VI of the Rehabilitation Act for supported employment services, The Massachusetts Rehabilitation Commission , agrees to operate and is responsible for the administration of the State Supported Employment Services Program in accordance with the supplement to the VR services portion of the <i>Unified or Combined State Plan</i> . ¹⁰ , the Rehabilitation Act, and all applicable regulations. ¹¹ , policies, and procedures established by the Secretary of Education. Funds made available under title VI are used solely for the provision of supported employment services and the administration of the supplement to the VR services portion of the <i>Unified or Combined State Plan</i> ;
4.	The Massachusetts Rehabilitation Commission under State law to perform the functions of the State regarding the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement, and is responsible for the administration of the VR program in accordance with 34 CFR 361.13(b) and (c);
5.	The Massachusetts Rehabilitation Commission certifies that the State legally may carry out each provision of the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement.
6.	The Massachusetts Rehabilitation Commission certifies that all provisions of the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement are consistent with State law.
7.	The Commissioner of MRC (Toni Wolf) has the authority under State law to receive, hold, and disburse Federal funds made available under the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement;
8.	The Commissioner of MRC (Toni Wolf) has the authority to submit the VR services portion of the <i>Unified or Combined State Plan</i> and the supplement for Supported Employment services;
9.	The Massachusetts Rehabilitation Commission has adopted or otherwise formally approved the plan and its supplement.

ASSURANCES

Massachusetts' state plan continues to include required assurances.

The designated State agency or designated State unit, as appropriate and identified in the State certifications included with this VR services portion of the *Unified or Combined State Plan* and its supplement, through signature of the authorized individual, assures the Commissioner, that

¹⁰ No funds under title VI of the Rehabilitation Act may be awarded without an approved supported employment supplement to the VR services portion of the *Unified or Combined State Plan* in accordance with section 606(a) of the Rehabilitation Act.

¹¹ Applicable regulations, in part, include the citations in footnote 4, as well as Supported Employment program regulations at 34 CFR part 363.

it will comply with all of the requirements of the VR services portion of the *Unified or Combined State Plan* and its supplement, as set forth in sections 101(a) and 606 of the Rehabilitation Act. The individual authorized to submit the VR services portion of the *Unified or Combined State Plan* and its supplement makes the following assurances:

The State Plan must provide assurances that:	
1.	Public Comment on Policies and Procedures: The designated State agency assures it will comply with all statutory and regulatory requirements for public participation in the VR Services Portion of the <i>Unified or Combined State Plan</i> , as required by section 101(a)(16)(A) of the Rehabilitation Act. YES
2.	Submission of the VR services portion of the <i>Unified or Combined State Plan</i> and Its Supplement: The designated State unit assures it will comply with all requirements pertaining to the submission and revisions of the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement for the State Supported Employment Services program, as required by sections 101(a)(1), (22), (23), and 606(a) of the Rehabilitation Act; section 102 of WIOA in the case of the submission of a <i>Unified State Plan</i> ; section 103 of WIOA in the case of a submission of a <i>Combined State Plan</i> ; 34 C.F.R. 76.140. YES
3.	Administration of the VR services portion of the <i>Unified or Combined State Plan</i>: The designated State agency or designated State unit, as appropriate, assures it will comply with the requirements related to: (a) the establishment of the designated State agency and designated State unit, as required by section 101(a)(2) of the Rehabilitation Act. YES (b) either a State independent commission or State Rehabilitation Council, as required by section 101(a)(21) of the Rehabilitation Act. YES (c) consultations regarding the administration of the VR services portion of the <i>Unified or Combined State Plan</i>, in accordance with section 101(a)(16)(B) of the Rehabilitation Act. YES (d) the financial participation by the State, or if the State so elects, by the State and local agencies, to provide the amount of the non-Federal share of the cost of carrying out the VR program in accordance with section 101(a)(3). YES (e) as applicable, the local administration of the VR services portion of the <i>Unified or Combined State Plan</i>, in accordance with section 101(a)(2)(A) of the Rehabilitation Act. YES (f) as applicable, the shared funding and administration of joint programs, in accordance with section 101(a)(2)(A)(ii) of the Rehabilitation Act. YES (g) statewideness and waivers of statewideness requirements, as set forth in section 101(a)(4) of the Rehabilitation Act. (h) the requirements for cooperation, collaboration, and coordination, as required by sections 101(a)(11) and (24)(B); and 606(b) of the Rehabilitation Act. YES

The State Plan must provide assurances that:	
	(i) all required methods of administration, as required by <i>section 101(a)(6)</i> of the Rehabilitation Act. YES (j) the requirements for the comprehensive system of personnel development, as set forth in <i>section 101(a)(7)</i> of the Rehabilitation Act. YES (k) the compilation and submission to the Commissioner of statewide assessments, estimates, State goals and priorities, strategies, and progress reports, as appropriate, and as required by <i>sections 101(a)(15), 105(c)(2), and 606(b)(8)</i> of the Rehabilitation Act. YES (l) the reservation and use of a portion of the funds allotted to the State under <i>section 110</i> of the Rehabilitation Act for the development and implementation of innovative approaches to expand and improve the provision of VR services to individuals with disabilities, particularly individuals with the most significant disabilities as set forth in <i>section 101(a)(18)(A)</i>. YES (m) the submission of reports as required by <i>section 101(a)(10)</i> of the Rehabilitation Act. YES
4.	Administration of the Provision of VR Services: The designated State agency, or designated State unit, as appropriate, assures that it will: (a) comply with all requirements regarding information and referral services in accordance with <i>sections 101(a)(5)(E) and (20)</i> of the Rehabilitation Act. YES (b) impose no duration of residence requirement as part of determining an individual's eligibility for VR services or that excludes from services under the plan any individual who is present in the State in accordance with <i>section 101(a)(12)</i> of the Rehabilitation Act. YES (c) provide the full range of services listed in <i>section 103(a)</i> of the Rehabilitation Act, as appropriate, to all eligible individuals with disabilities in the State who apply for services or, if implementing an order of selection, in accordance with criteria established by the State for the order of selection as set out in <i>section 101(a)(5)</i> of the Rehabilitation Act. YES (d) determine whether comparable services and benefits are available to the individual in accordance with <i>section 101(a)(8)</i> of the Rehabilitation Act. YES (e) comply with the requirements for the development of an individualized plan for employment in accordance with <i>section 102(b)</i> of the Rehabilitation Act. YES (f) comply with requirements regarding the provisions of informed choice for all applicants and eligible individuals in accordance with <i>section 102(d)</i> of the Rehabilitation Act. YES

The State Plan must provide assurances that:	
	(g) provide vocational rehabilitation services to American Indians who are individuals with disabilities residing in the State, in accordance with <i>section 101(a)(13)</i> of the Rehabilitation Act. YES (h) comply with the requirements for the conduct of semiannual or annual reviews, as appropriate, for individuals employed either in an extended employment setting in a community rehabilitation program or any other employment under <i>section 14(c)</i> of the <i>Fair Labor Standards Act of 1938</i>, as required by <i>sections 101(a)(14)</i> and <i>511</i> of the Rehabilitation Act YES (i) meet the requirements in <i>sections 101(a)(17)</i> and <i>103(b)(2)</i> of the Rehabilitation Act if the State elects to construct, under special circumstances, facilities for community rehabilitation programs. YES (j) with respect to students with disabilities, the State: (i) has developed and will implement, (A) strategies to address the needs identified in the assessments; and (B) strategies to achieve the goals and priorities identified by the State, to improve and expand vocational rehabilitation services for students with disabilities on a statewide basis; and YES (ii) has developed and will implement strategies to provide pre-employment transition services (<i>sections 101(a)(15), 101(a)(25), and 113</i>). YES (iii) shall reserve not less than 15 percent of the allocated funds for the provision of pre-employment transition services; such funds shall not be used to pay for the administrative costs of providing pre-employment transition services. YES
5.	Program Administration for the Supported Employment Title VI Supplement to the State Plan: (a) The designated State unit assures that it will include in the VR services portion of the <i>Unified or Combined State Plan</i> all information required by <i>section 606</i> of the Rehabilitation Act. YES (b) The designated State agency assures that it will submit reports in such form and in accordance with such procedures as the Commissioner may require and collects the information required by <i>section 101(a)(10)</i> of the Rehabilitation Act separately for individuals receiving supported employment services under <i>title I</i> and individuals receiving supported employment services under <i>title VI</i> of the Rehabilitation Act. YES

The State Plan must provide assurances that:	
6.	Financial Administration of the Supported Employment Program (Title VI): (a) The designated State agency assures that it will expend no more than 2.5 percent of the State's allotment under title VI for administrative costs of carrying out this program; and, the designated State agency or agencies will provide, directly or indirectly through public or private entities, non-Federal contributions in an amount that is not less than 10 percent of the costs of carrying out supported employment services provided to youth with the most significant disabilities with the funds reserved for such purpose under section 603(d) of the Rehabilitation Act, in accordance with <i>section 606(b)(7)(H) and (I)</i> of the Rehabilitation Act. YES (b) The designated State agency assures that it will use funds made available under <i>title VI</i> of the Rehabilitation Act only to provide supported employment services to individuals with the most significant disabilities, including extended services to youth with the most significant disabilities, who are eligible to receive such services; and, that such funds are used only to supplement and not supplant the funds provided under <i>Title I</i> of the Rehabilitation Act, when providing supported employment services specified in the individualized plan for employment, in accordance with <i>section 606(b)(7)(A) and (D)</i>, of the Rehabilitation Act. YES
7.	Provision of Supported Employment Services: (a) The designated State agency assures that it will provide supported employment services as defined in section 7(39) of the Rehabilitation Act. YES (b) The designated State agency assures that the comprehensive assessment of individuals with significant disabilities conducted under <i>section 102(b)(1)</i> of the Rehabilitation Act and funded under title I of the Rehabilitation Act includes consideration of supported employment as an appropriate employment outcome, in accordance with the requirements of <i>section 606(b)(7)(B)</i> of the Rehabilitation Act an individualized plan for employment that meets the requirements of <i>section 102(b)</i> of the Rehabilitation Act , which is developed and updated with title I funds, in accordance with <i>sections 102(b)(3)(F) and 606(b)(7)(C) and (E)</i> of the Rehabilitation Act. YES

Appendix 1: Performance Goals for the Core Programs

Each state submitting a *Unified* or *Combined State Plan* is required to identify expected levels of performance for each of the primary indicators of performance for the first two years covered by the plan. The state is required to reach agreement with the Secretary of Labor, in conjunction with the Secretary of Education, on state-negotiated levels of performance for the indicators for each of the first two years of the plan.

Include the state's expected levels of performance relating to the performance accountability indicators based on primary indicators of performance described in *section 116(b)(2)(A)* of the Workforce Innovation and Opportunity Act (WIOA).

	Vocational Rehabilitation Program			
	Program Year:		Program Year:	
	Expected Level	Negotiated Level	Expected Level	Negotiated Level
Employment (Second Quarter after Exit) ²²	53%		54%	
Employment (Fourth Quarter after Exit) ²²	50%		51%	
Median Earnings (Second Quarter after Exit) ¹²	\$5,300		\$5,500	
Credential Attainment Rate	27%		29%	
Measurable Skill Gains	45%		50%	

GEPA 427 Form Instructions for Application Package - Vocational Rehabilitation

Section 427 of the General Education Provisions Act (GEPA) ([20 U.S.C. 1228a](#)) applies to a State applicant submitting a state plan for a formula grant from the US Department of Education. The State applicant is responsible for completing the GEPA Section 427 form that provides a description of the steps the State proposes to take to ensure all program beneficiaries have equitable access to, and participation in, its Federally funded, State-level project or activity.

GEPA Section 427 Form Instructions for State Applicants

State applicants must respond to the following four questions:

1. Describe how your entity's existing mission, policies, or commitments ensure equitable access to, and equitable participation in, the proposed project or activity.
2. Based on your proposed project or activity, what barriers may impede equitable access and participation of students, educators, or other beneficiaries?
3. Based on the barriers identified, what steps will you take to address such barriers to equitable access and participation in the proposed project or activity?
4. What is your timeline, including targeted milestones, for addressing these identified barriers?

1. Describe how your entity's existing mission, policies, or commitments ensure equitable access to, and equitable participation in, the proposed project or activity.

MRC's Vocational Rehabilitation Program formula grant meets section 427 of the US Department of Education's General Education Provisions Act (GEPA). People with disabilities are the primary beneficiaries of the proposed project activities. MRC promotes equality, empowerment and independence of individuals with disabilities. These goals are achieved through enhancing and encouraging personal choice and the right to succeed or fail in the pursuit of independence and employment in the community. MRC provides comprehensive services to people with disabilities that maximize their quality of life and economic self-sufficiency in the community. The MRC has decades of experience as a committed and innovative implementer of accessible and inclusive social service programming in Massachusetts.

MRC is committed to ensuring equal access to VR participants, including those who are members of groups that have been traditionally been underrepresented based on race, color, national origin, gender, age, or disability. MRC is be guided by five policies: (1) Provide services at fully accessible locations; (2) Provide all dissemination products and information in accessible formats; (3) Actively monitor participation in VR services through the use of demographic analysis of participants to ensure that targeted populations are being reached, as well as through evaluations which ask specific questions about accessibility of the materials and delivery, and the cultural sensitivity of the staff; (4) Work collaboratively with all stateholders to ensure equal access and participation in services (5) Use websites and other technologies which will be fully accessible, to provide electronic means to attain knowledge development information, retrieval of technical assistance materials and online learning.

MRC is committed to making sure that all materials and products resulting from the VR program are fully accessible to individuals with disabilities.

MRC will make all print materials produced available in alternate formats in the format most usable to the requestor, such as large print, Braille, audiotape, or electronic file on computer disk. All materials will prominently display a notice that the information is available in an alternate format. All written and audiovisual materials (e.g., PowerPoint) that contain tables and graphics will include a written description of the information contained therein. A small volume of Braille material can be produced in-house, using a Braille embosser. For larger requests, project staff will send documents to commercial printing houses. Audiovisual materials including film and video will be closed-captioned. Individual requests will be responded to in a timely manner. Website accessibility is not simply about providing alternatives for people with visual impairments. Other groups to consider include people who are deaf (using closed-captioning on video), people with cognitive disabilities (readable text, appropriate use of color), and people with mobility impairments (providing an effective way to navigate a site without a mouse or keyboard). The overall goal for the project-related websites including online databases is accessibility to anyone who connects. To achieve this goal, the project's web designers and programmers will make every effort to achieve XHTML (Extensible Hypertext Markup Language) compliance when coding website content. This will ensure that website content is both backwards and future-compatible and is accessible by standard-based technologies (browsers). Using valid CSS (Cascading Style Sheets) with XHTML adds presentational value to newer technologies while not taking away anything from older ones. Commonly agreed upon accessibility standards will be fully complied with, including the accessibility requirements set out in Section 508 of the 1998 Rehabilitation Act Amendments, the W3C's Web Content Accessibility Guidelines (WCAG), and the WebAIM Guide to Accessibility. The project will use the latest methods and tools for web accessibility validations, and closely monitor emerging trends in web accessibility. MRC will also use management and delivery, including Zoom, Teams, and Webex for web conferences, webinars, and webcasts and will ensure all content is fully accessible.

2. Based on your proposed project or activity, what barriers may impede equitable access and participation of students, educators, or other beneficiaries?

Potential barriers to equitable access to VR services could be related to geographic location, ability to access services remotely, ability to apply for and access MRC services for those individuals who speak languages other than English, and accessibility of MRC materials, websites, and other products.

3. Based on the barriers identified, what steps will you take to address such barriers to equitable access and participation in the proposed project or activity?

MRC will utilize findings from the annual statewide consumer needs assessment, as well as consultation from the Statewide Rehabilitation Council, to guide outreach to diverse and potentially underserved populations. MRC will recruit individuals with disabilities from diverse backgrounds to participate in the VR program and will work with other partner state agencies

as part of this process. MRC will outreach on VR services to diverse populations across the Commonwealth, including those who may be traditionally underserved, to maximize the participation of individuals from diverse ethnic, cultural, and linguistic backgrounds in the VR program. Monitoring of demographic data will focus on ensuring that participation is fully reflective of diversity in terms of race and national origin within the targeted areas. Materials used by MRC VR will be carefully reviewed to ensure they are reflective and responsive to diverse cultures. As services are delivered, they will be comprehensively reviewed so that they are fully respectful of cultural differences. For example, such dynamics as parent and family roles, acceptance of assistance from government entities, and cultural views of disability can be impacted by differences in culture, and the project will fully account for and be responsive to these types of variations. Efforts will be made to ensure language access for all eligible individuals and families. This will include the availability of translator services, and utilization of MRC's Statewide Bilingual Group of staff. MRC has a Language Access Plan, which defines actions to be taken by the agency to ensure access to services for persons with limited English proficiency which will be utilized to support RISE. The MRC also supports a Diversity Committee, which includes Lesbian, Gay, and Bisexual, Transgender and Questioning (LGBTQ), African American and Latino sub-committees that will be part of these efforts as well. Resources available from the Center for International Rehabilitation Research Information and Exchange (CIRRIE) will also be used to guide these efforts. MRC will address reasonable accommodation issues for participants and other partners to ensure the ability of all stakeholders to participate in the VR program. MRC will work with its partners to ensure these accommodations, including sign language interpreters, CART reporters, readers, materials in alternate formats, among others are made available to all stakeholders. To assist individuals who are deaf and hard of hearing, vision impaired, or who have learning disabilities, the MRC has an ongoing budget line for both interpreter and translation services that are available to participants, and MRC has a team of Rehabilitation Counselors for the Deaf.

MRC has twelve VR counselors skilled in American Sign Language (ASL) and are qualified to work with consumers who are deaf or hard of hearing; thirty are fluent in Spanish and work with Hispanic consumers; four are able to communicate in Cantonese; two in Vietnamese, three are fluent in Portuguese; three are fluent in Khmer, three are fluent in French/Haitian Creole, and one counselor is fluent in Hindi and Tamil. A smaller number of area directors, head clerks and other clerical staff are fluent in American Sign Language, Spanish, Khmer, Cantonese, Mandarin, Haitian Creole, or Portuguese. Eleven full- and part-time sign language interpreters are also on staff. The Commission also maintains a statewide contract with the Massachusetts Commission for the Deaf and Hard of Hearing to secure additional ASL interpreters and CART reporters, as needed. Staff with specific language skills and interpreters are geographically placed so as to coincide with population and other demographics relating to target consumer groups.

MRC also has Area Offices located throughout the state in 20 locations. MRC also uses a hybrid model which allows for consumers and job seekers to access VR and Supported Employment services using remote technologies such as Zoom, teams, phone calls, text messages, and other methods to address any barriers related to geographic location and access to MRC offices based

on transportation as well as in person services. Vended services are also available to all locations across Massachusetts. MRC also allows the ability to apply for and complete the intake and eligibility process using an online application and remote technologies, as well as through in person meetings.

4. What is your timeline, including targeted milestones, for addressing these identified barriers?

MRC has put into place all the above strategies for addressing potential barriers to accessing the Vocational Rehabilitation Program. MRC reviews these strategies and efforts on an ongoing basis to ensure full and equitable access to the Vocational Rehabilitation Program for all individuals with disabilities in the Commonwealth of Massachusetts. MRC is currently working on implementing a new data system for the Vocational Rehabilitation Program which when fully implemented will have a participant/consumer portal to increase access. MRC has also implemented an integrated eligibility system to increase access to vocational rehabilitation services provided by MRC. Progress is reviewed annually. MRC's equitable access strategies to address potential barriers are also detailed throughout the Vocational Rehabilitation Section of the WIOA State Plan.

**GEPA 427 Form Instructions for Application Package - Supported Employment
EQUITY FOR STUDENTS, EDUCATORS, AND OTHER PROGRAM BENEFICIARIES**

GEPA Section 427 Form Instructions for State Applicants

State applicants must respond to the following four questions:

1. Describe how your entity's existing mission, policies, or commitments ensure equitable access to, and equitable participation in, the proposed project or activity.
2. Based on your proposed project or activity, what barriers may impede equitable access and participation of students, educators, or other beneficiaries?
3. Based on the barriers identified, what steps will you take to address such barriers to equitable access and participation in the proposed project or activity?
4. What is your timeline, including targeted milestones, for addressing these identified barriers?

1. Describe how your entity's existing mission, policies, or commitments ensure equitable access to, and equitable participation in, the proposed project or activity.

MRC's Vocational Rehabilitation Program Supported Employment formula grant meets section 427 of the US Department of Education's General Education Provisions Act (GEPA). People with disabilities are the primary beneficiaries of the proposed project activities. MRC promotes equality, empowerment and independence of individuals with disabilities. These goals are achieved through enhancing and encouraging personal choice and the right to succeed or fail in the pursuit of independence and employment in the community. MRC provides comprehensive services to people with disabilities that maximize their quality of life and economic self-sufficiency in the community. The MRC has decades of experience as a committed and

innovative implementer of accessible and inclusive social service programming in Massachusetts.

MRC is committed to ensuring equal access to Supported Employment participants, including those who are members of groups that have been traditionally been underrepresented based on race, color, national origin, gender, age, or disability. MRC is be guided by five policies: (1) Provide services at fully accessible locations; (2) Provide all dissemination products and information in accessible formats; (3) Actively monitor participation in VR services through the use of demographic analysis of participants to ensure that targeted populations are being reached, as well as through evaluations which ask specific questions about accessibility of the materials and delivery, and the cultural sensitivity of the staff; (4) Work collaboratively with all stakeholders to ensure equal access and participation in services (5) Use websites and other technologies which will be fully accessible, to provide electronic means to attain knowledge development information, retrieval of technical assistance materials and online learning. MRC is committed to making sure that all materials and products resulting from the VR and Supported Employment program are fully accessible to individuals with disabilities. MRC will make all print materials produced available in alternate formats in the format most usable to the requestor, such as large print, Braille, audiotape, or electronic file on computer disk. All materials will prominently display a notice that the information is available in an alternate format. All written and audiovisual materials (e.g., PowerPoint) that contain tables and graphics will include a written description of the information contained therein. A small volume of Braille material can be produced in-house, using a Braille embosser. For larger requests, project staff will send documents to commercial printing houses. Audiovisual materials including film and video will be closed-captioned. Individual requests will be responded to in a timely manner. Website accessibility is not simply about providing alternatives for people with visual impairments. Other groups to consider include people who are deaf (using closed-captioning on video), people with cognitive disabilities (readable text, appropriate use of color), and people with mobility impairments (providing an effective way to navigate a site without a mouse or keyboard). The overall goal for the project-related websites including online databases is accessibility to anyone who connects. To achieve this goal, the project's web designers and programmers will make every effort to achieve XHTML (Extensible Hypertext Markup Language) compliance when coding website content. This will ensure that website content is both backwards and future-compatible and is accessible by standard-based technologies (browsers). Using valid CSS (Cascading Style Sheets) with XHTML adds presentational value to newer technologies while not taking away anything from older ones. Commonly agreed upon accessibility standards will be fully complied with, including the accessibility requirements set out in Section 508 of the 1998 Rehabilitation Act Amendments, the W3C's Web Content Accessibility Guidelines (WCAG), and the WebAIM Guide to Accessibility. The project will use the latest methods and tools for web accessibility validations, and closely monitor emerging trends in web accessibility. MRC will also use management and delivery, including Zoom, Teams, and Webex for web conferences, webinars, and webcasts and will ensure all content is fully accessible.

2. Based on your proposed project or activity, what barriers may impede equitable access and participation of students, educators, or other beneficiaries?

Potential barriers to equitable access to VR services could be related to geographic location, ability to access services remotely, ability to apply for and access MRC services for those individuals who speak languages other than English, and accessibility of MRC materials, websites, and other products.

3. Based on the barriers identified, what steps will you take to address such barriers to equitable access and participation in the proposed project or activity?

MRC will utilize findings from the annual statewide consumer needs assessment, as well as consultation from the Statewide Rehabilitation Council, to guide outreach to diverse and potentially underserved populations. MRC will recruit individuals with disabilities from diverse backgrounds to participate in the VR and Supported Employment program and will work with other partner state agencies as part of this process. MRC will outreach on VR services to diverse populations across the Commonwealth, including those who may be traditionally underserved, to maximize the participation of individuals from diverse ethnic, cultural, and linguistic backgrounds in the VR and Supported Employment programs. Monitoring of demographic data will focus on ensuring that participation is fully reflective of diversity in terms of race and national origin within the targeted areas.

Materials used by MRC VR and Supported Employment will be carefully reviewed to ensure they are reflective and responsive to diverse cultures. As services are delivered, they will be comprehensively reviewed so that they are fully respectful of cultural differences. For example, such dynamics as parent and family roles, acceptance of assistance from government entities, and cultural views of disability can be impacted by differences in culture, and the project will fully account for and be responsive to these types of variations. Efforts will be made to ensure language access for all eligible individuals and families. This will include the availability of translator services, and utilization of MRC's Statewide Bilingual Group of staff. MRC has a Language Access Plan, which defines actions to be taken by the agency to ensure access to services for persons with limited English proficiency which will be utilized to support RISE. The MRC also supports a Diversity Committee, which includes Lesbian, Gay, and Bisexual, Transgender and Questioning (LGBTQ), African American and Latino sub-committees that will be part of these efforts as well. Resources available from the Center for International Rehabilitation Research Information and Exchange (CIRRIE) will also be used to guide these efforts.

MRC will address reasonable accommodation issues for participants and other partners to ensure the ability of all stakeholders to participate in the VR program. MRC will work with its partners to ensure these accommodations, including sign language interpreters, CART reporters, readers, materials in alternate formats, among others are made available to all stakeholders. To assist individuals who are deaf and hard of hearing, vision impaired, or who have learning disabilities, the MRC has an ongoing budget line for both interpreter and translation services that are available to participants, and MRC has a team of Rehabilitation Counselors for the Deaf.

MRC has twelve VR counselors skilled in American Sign Language (ASL) and are qualified to work with consumers who are deaf or hard of hearing; thirty are fluent in Spanish and work with Hispanic consumers; four are able to communicate in Cantonese; two in Vietnamese, three are fluent in Portuguese; three are fluent in Khmer, three are fluent in French/Haitian Creole, and one counselor is fluent in Hindi and Tamil. A smaller number of area directors, head clerks and other clerical staff are fluent in American Sign Language, Spanish, Khmer, Cantonese, Mandarin, Haitian Creole, or Portuguese. Eleven full- and part-time sign language interpreters are also on staff. The Commission also maintains a statewide contract with the Massachusetts Commission for the Deaf and Hard of Hearing to secure additional ASL interpreters and CART reporters, as needed. Staff with specific language skills and interpreters are geographically placed to coincide with population and other demographics relating to target consumer groups. MRC also has Area Offices located throughout the state in 20 locations. MRC also uses a hybrid model which allows for consumers and job seekers to access VR and Supported Employment services using remote technologies such as Zoom, teams, phone calls, text messages, and other methods to address any barriers related to geographic location and access to MRC offices based on transportation as well as in person services. Vended services are also available to all locations across Massachusetts. MRC also allows the ability to apply for and complete the intake and eligibility process using an online application and remote technologies, as well as through in person meetings.

4. What is your timeline, including targeted milestones, for addressing these identified barriers?

MRC has put into place all the above strategies for addressing potential barriers to accessing the Supported Employment program. MRC reviews these strategies and efforts on an ongoing basis to ensure full and equitable access to the Supported Employment Program for all individuals with disabilities in the Commonwealth of Massachusetts. MRC is currently working on implementing a new data system for the Vocational Rehabilitation and Supported Employment Program which when fully implemented will have a participant/consumer portal to increase access. This will be launched in Summer 2024. MRC has also implemented an integrated eligibility system to increase access to vocational rehabilitation services provided by MRC. Progress is reviewed annually.

MRC's equitable access strategies to address potential barriers are also detailed throughout the Vocational Rehabilitation Section of the WIOA State Plan.

MASSACHUSETTS COMMISSION FOR THE BLIND (MCB) STATE PLAN

TWO YEAR UPDATE

MCB and the SRC meet quarterly. Discussions of progress on goals and recommendations are discussed throughout the year. At the end of the year the goals and recommendations are sent to the SRC for review; goals and recommendations are adjusted accordingly. The SRC continues to work with partners on recruitment strategy.

MCB continues to provide vocational rehabilitation and assistive supports to help individuals who are blind or visually impaired obtain and maintain employment. MCB is focused on employment outcomes with an emphasis on supported employment, individualized planning, job retention and coaching services, and more. This is consistent with Massachusetts' approach toward measurable labor market outcomes. MCB is focused on supported employment and long-term job stabilization, using evidence-informed practices and coordinated with extended service providers once an individual achieves job stability. This is consistent with the Talent Strategies, emphasizing worker mobility and advancement over short-term job placement.

MCB is continuing to collaborate with WIOA partners to better support integrated service delivery. Partnerships with MassHealth, DDS, DMH, and others help align vocational rehabilitation services with broader wraparound services to better support workforce participation. MCB is also focused on providing youth transition services and workforce preparation services for students through partnerships with education, community organizations, work-based learning, and more. This focus will help prepare youth for in-demand jobs through early exposure to the workforce.

MCB is also focused on performance metrics and accountability including employment rates, median earnings, credentials, upskilling, and other WIOA indicators. Performance monitoring will be better facilitated with a data-driven approach.

Program-Specific Requirements for Vocational Rehabilitation (Blind)

The *Vocational Rehabilitation (VR) Services Portion of the Unified or Combined State Plan** must include the following descriptions and estimates, as required by section 101(a) of the Rehabilitation Act of 1973, as amended by WIOA:

* Sec. 102(b)(D)(iii) of WIOA

a. Input of State Rehabilitation Council (RC)

All agencies, except for those that are independent consumer-controlled commissions, must describe the following:

1. input provided by the State Rehabilitation Council, including input and recommendations on the VR services portion of the *Unified or Combined State Plan*, recommendations from the Council's report, the review and analysis of consumer satisfaction, and other Council reports that may have been developed as part of the Council's functions;

The MCB RC has made the following recommendations for FFY 2023 on VR services

- Make budget recommendations and advocate, when appropriate, to ensure that MCB both receives sufficient VR funding and provides appropriate and cost-effective services for consumers;
- Ensure that MCB's social services and vocational rehabilitation staff can fully participate in IEP meetings for children and youth;

- Enhance the service delivery of MCB VR counselors to increase job development activities, job placement services, technology services, job retention, and job coaching services to all individuals (including individuals with other disabilities in addition to blindness) receiving vocational services at MCB regional offices;
- Work and advocate for accessibility of state and local government portal systems, including all applications for services and all documents posted on these portals; and
- Continue to work with state officials to support the Commonwealth's initiative to move forward as a model employer.

For some time, the MCB RC has been concerned that the availability and quality of braille instruction provided by school systems to elementary through high school age children can vary in quality and frequency from town to town. The MCB RC supports the agency's decision to take the lead in revitalizing the Braille Literacy Council. The MCB RC has made no specific recommendations during the past year to the agency on this issue.

The MCB RC is concerned about the increasing difficulty that blind job seekers have in filling out inaccessible company applications. The agency does have employment specialists as well as VR counselors who can help consumers but does agree that this is a major issue and that advocacy from consumer groups and collaboration is very important for the long term in making these websites more accessible. The MCB RC has made no specific recommendations during the past year to the agency on this issue.

MCB and the MCB RC are concerned that vending stands in Massachusetts have been on the decline, this has been exacerbated by hybrid work model adopted by many agencies because of the COVID-19 pandemic MCB continues to explore other opportunities away from the food industry to diversify the program. A partnership was established with the Lottery Commission where MCB was involved in the testing of new lottery machines for accessibility. The machines have been purchased and are working well for blind vendors. The MCB RC has made no additional recommendations during the past year to the agency on this issue.

MCB RC members remain very interested in the effects of MCB's usage of Section 257 (State statute) to evaluate the purchase pricing of services through community providers. The intent of the law is to simplify pricing and make it more efficient. MCB has explained that this rate restructuring will benefit consumers heavily impacted by older and more complicated pricing, including the deaf-blind and multiply impaired populations. Most vendors are happy with the newer simpler 257 rates. The rate increase assures access to more providers for MCB consumers.

MCB RC has continued to review the consumer satisfaction studies conducted. The Council had in previous years provided input into the design of these studies as well as the design of the comprehensive needs assessment study. The MCB RC worked with the agency on the development and implementation of the 2018 comprehensive needs assessment methodology in line with the requirements and focus of WIOA on competitive integrated employment. One

focus group was held, and a web-based survey was developed and conducted. The MCB RC will be reviewing the results of the 2023 MCB All-Consumer Survey.

The RC had previously expressed concerns that Survey Monkey is not secure, so Google Forms was used. While Google Forms is minimally accessible, in practice it proved to not be user-friendly for blind consumers. The RC and MCB will re-think and re-evaluate future use of web-based surveys. MCB will work closely with the RC and a sub-committee on needs assessment to plan future needs assessment methodology. Recently, the Massachusetts Commission for the Blind (MCB) engaged a consultant to develop an MCB survey of its consumers to support MCB's efforts to better ascertain the data dynamics of people with blindness throughout the Commonwealth. The goal of this innovative program is to enhance its development and targeting of future programming and to contribute to its comprehensive needs assessment. The consultant developed a short survey to be asked during the intake process. The consultant developed a much larger panel of questions that could be used in the survey of existing clients. Now MCB is looking to progress to the next stage which will be implementing the surveys. MCB has issued an RFR to seek a consultant to provide guidance via a report and to implement the long survey that will go to existing consumers and provide analytics on the data collected. Representatives of the RC will provide feedback and advice throughout this process.

The MCB RC has had a long-term interest in transportation accessibility and its impact on the ability of consumers to pursue vocational objectives. The director of MCB's Mobility Unit attends a number of meetings on regional and statewide transportation issues to keep the agency informed on issues relevant to transportation accessibility. MCB and the RC are closely following newer transportation options such as UBER, Lyft etc. A number of blind persons who are proficient with technology have benefitted from these services. While the MCB RC believes that lack of transportation is a major barrier to consumers' ability to participate in VR services and to obtain employment, it has made no specific recommendations during the past year to the agency on this issue.

The MCB RC continues to pay close attention to the agency's implementation of the Workforce Innovation and Opportunity Act. MCB provides updates on the effort at each meeting. The agency and the council have continued to refine goals and priorities and plans for innovation and expansion based on the new law. MCB and the Rehabilitation Council are in full support of the Workforce Development Plan Vision that all Massachusetts residents will benefit from a seamless system of education and workforce services that supports career pathways for individuals and leads to a more informed, educated, and skilled workforce, which meets the Commonwealth's business demands and sustains a thriving economy.

The agency and the council are committed to the following paths to the realization of that vision:

- Work with Core Program partners to promote Career Pathways for individuals who are legally blind and to improve the one-stop delivery system.

- Strengthen the alignment of the MCB VR program with the other core programs of the workforce development system.
- Use state and regional labor market information analysis to develop more employment options for consumers who are legally blind, utilizing regional labor market data, regional economic development agencies, and business intelligence gathered from interactions with core partners. MCB has conducted a couple of research projects over the last few years that has investigated trends in the labor market as a result of COVID-19.
- Participate in the development of a coordinated, streamlined regional strategy for business partner outreach and follow up.

The agency's performance on RSA standards and indicators over previous years has at all times met the minimum level of overall performance established by RSA.

Some agency-specific results for FFY 2022 are:

- Percentage of MCB consumers who exited with employment was 57.6%.
- Average hourly earnings for competitive employment outcomes for MCB was \$22.86.
- Average number of hours worked per week for competitive employment outcomes was 31.16 hours.
- Cost per participant served in Career Services: \$159.84
- Cost per participant served in Training Services: \$4,206.05
- Ratio of Minority Service Rate to Non-Minority Service Rate: .911.

The MCB RC has made no specific recommendations during the year on VR performance evaluations. It did make recommendations and participate as a partner in the development of the plan goals. All of the MCB RC recommendations on plan goals have been adopted and are included in this plan.

The Rehabilitation Council submits an annual report to the Governor of Massachusetts and to the Rehabilitation Services Administration.

2. the Designated State unit's response to the Council's input and recommendations; and

The MCB RC has made no specific recommendations during the past year on VR services and performance evaluations. It did make recommendations and participate as a partner in the development of the plan goals. All of the MCB RC recommendations on plan goals were jointly developed, agreed to, and adopted and are included in this plan (Section I. State Goals and Priorities).

3. the designated State unit's explanations for rejecting any of the Council's input or recommendations.

No input or recommendations were rejected.

b. Request for Waiver of Statewideness

When requesting a waiver of the statewideness requirement, the designated State unit must identify the types of services to be provided by the program on a non-statewide basis. The waiver request must also include written assurances that:

1. a local public agency will provide the non-Federal share of costs associated with the services to be provided in accordance with the waiver request;

Not applicable. The agency is not requesting a waiver of statewideness.

2. the designated State unit will approve each proposed service before it is put into effect; and

Not applicable. The agency is not requesting a waiver of statewideness.

3. All *State Plan* requirements will apply requirements of the VR services portion of the *Unified or Combined State Plan* will apply to the services approved under the waiver.

Not applicable. The agency is not requesting a waiver of statewideness.

c. Cooperative Agreements with Agencies Not Carrying Out Activities Under the Statewide Workforce Development System.

Describe interagency cooperation with and utilization of the services and facilities of agencies and programs that are not carrying out activities through the statewide workforce development system with respect to:

1. Federal, State, and local agencies and programs;

The Massachusetts Commission for the Blind falls within the purview of the Executive Office of Health and Human Services of the Commonwealth of Massachusetts. Other agencies within this organization include: the Department of Mental Health, Department of Developmental Services, Department of Public Health, Department of Children and Families, Department of Transitional Assistance, Department of Youth Services, Department of Elder Services, Office of Medicaid (MassHealth), Massachusetts Commission for the Deaf and Hard-of-Hearing, Massachusetts Rehabilitation Commission and Office for Refugees and Immigrants. The agency

has strong cooperative and collaborative relationships with all of these agencies. Agency heads meet to discuss issues of mutual concern and to resolve inter-agency problems. Other agency staffs meet collaboratively to work on numerous Secretariat-wide projects. The Vocational Rehabilitation Counselors in the agency's unit that provides specialized services to persons who are deaf-blind and intellectually disabled blind work closely with the Massachusetts Department of Developmental Services (DDS) to facilitate development and completion of plans and services for persons with developmental disabilities who may need their services in addition to vocational rehabilitation services. These specialized counselors also work very closely with the Massachusetts Commission for the Deaf and Hard-of-Hearing and staff of the Helen Keller National Center for Deaf-Blind Youths and Adults to provide coordinated services to deaf-blind persons.

2. State programs carried out under section 4 of the Assistive Technology Act of 1998;

The Massachusetts Commission for the Blind has excellent relationships with the programs funded under section 4 of the Assistive Technology Act and administered through the Massachusetts Rehabilitation Commission. These include MassMatch, a program that provides comprehensive information about the availability and funding of assistive technology; the Assistive Technology Program that provides AT assessments, buys, and sets up equipment, and provides train and follow-up. Three providers, MA Easter Seals and United Cerebral Palsy of Berkshire County and the University of MA-Dartmouth Center for Rehabilitation Engineering provide services on a regional basis and have on-site AT devices for evaluation and training. The Massachusetts Assistive Technology Loan Program, operated by Easter Seals Massachusetts, gives people with disabilities and their families access to low-interest cash loans so they can buy the assistive technology devices they need. A number of MCB consumers benefit each year from these programs.

3. Programs carried out by the Under Secretary for Rural Development of the United States Department of Agriculture;

While Massachusetts is not predominately a rural state, there are rural communities, especially in central and western Massachusetts. When appropriate, the agency works with USDA Rural Development programs such as the Small Business Resource at Cornell University in developing vocational opportunities for consumers. The agency makes frequent referrals to the SNAP program of the U.S. Department of Agriculture that is administered by the Department of Transitional Assistance in Massachusetts; MCB has also participated in special outreach initiatives of that program.

4. Noneducational agencies serving out-of-school youth; and

Massachusetts has a number of programs for out-of-school youth that MCB works with to provide services for individual consumers. During the past year, MCB has been working closely with the Partners for Youth with Disabilities (PYD), a non-profit agency that empowers youth with disabilities to reach their full potential by providing transformative mentoring programs,

youth development opportunities, and inclusion expertise. MCB offers all transition-age students and out-of-school youth mentoring through the Partners for Youth with Disabilities Mentor Match program. The Mentor Match pairs youth and young adults with disabilities with adult mentors who best fit their personality, interests, and skills. MCB also has begun offering transition-age students and out-of-school youth online mentoring through Project L.E.N.S.

5. State use contracting programs.

In 2015, the Massachusetts Supplier Diversity Program was expanded to include Veteran Business Enterprises, Lesbian, Gay, Bisexual, and Transgender Business Enterprises; and Disability-Owned Business Enterprises. Some consumers of the Massachusetts Commission for the Blind have been able to take advantage of this program to increase their business and vocational opportunities.

d. Coordination with Education Officials

Describe:

B1. DSU's plans

The designated State unit's plans, policies, and procedures for coordination with education officials to facilitate the transition of students with disabilities from school to the receipt of VR services, including pre-employment transition services, as well as procedures for the timely development and approval of individualized plans for employment for the students.

The Massachusetts Commission for the Blind's plans, policies, and procedures for coordination with education officials to facilitate the transition of students with disabilities include:

- The implementation of the agency's agreement with the Massachusetts Department of Elementary and Secondary Education (DESE). MCB and ESE cooperate to outreach to and identify students with visual impairments who are in need of transition services and pre-employment transition services. Outreach to these students occurs as early as possible during the transition planning process and includes information about the purpose of the vocational rehabilitation program, eligibility requirements, application procedures, and scope of services that may be provided to eligible individuals.
- The continued provision of consultation and technical assistance to the education agency relative to the transition of students with disabilities from school to post-school activities, including pre-employment transition services and vocational rehabilitation services.
- The continued transition planning by MCB and education personnel that facilitates the development and completion of students' individual education programs through the Chapter 688 process described in Section B. below.

2. Information on the formal interagency agreement with the State educational agency with respect to:

A. consultation and technical assistance to assist educational agencies in planning for the transition of students with disabilities from school to post-school activities, including VR services;

The Massachusetts Commission for the Blind has for several years had a cooperative agreement that complies with WIOA relative to the services provided to legally blind children. The agreement describes the roles and responsibilities, including financial responsibilities of each agency, including provisions for determining state lead agencies and qualified personnel responsible for transition services. It also provides for regular communication and information sharing on topics of mutual interest such as agency policy initiatives; resources; transition activities, including pre-employment transition services; the Massachusetts Curriculum Frameworks; and the Expanded Core Curriculum for legally blind students.

B. transition planning by personnel of the designated State agency and educational agency that facilitates the development and implementation of their individualized education programs;

MCB conducts formal transition planning in conjunction with education personnel that facilitates the development and completion of students' individualized education programs through the following process. As indicated above, MCB falls within the purview of the Executive Office of Health and Human Services of the Commonwealth of Massachusetts. Chapter 688, a state law passed in 1984 mandated that the Executive Office of Health and Human Services establish a Bureau of Transition Planning to assure the provision of adequate transitional planning services to disabled persons completing special education. The Bureau of Transitional Planning monitors an inter-agency cooperative planning process that requires the participation of all relevant human services agencies. An individual transition plan must be developed by the agencies at least six months before the termination of special education services. This plan must be approved by an inter-agency Transitional Advisory Committee, the Secretary of Human Services, and the consumer or his guardian. The plan outlines the services to be provided and identifies the agency responsible for the provision of each service. This process assures that an individualized plan for employment is developed and approved for each student determined to be eligible for vocational rehabilitation services before the student leaves the school setting. MCB has found that this transitional planning process has clarified agency responsibilities and has made it much easier to arrange necessary support services to enable consumers to participate in vocational rehabilitation services.

C. roles and responsibilities, including financial responsibilities, of each agency, including provisions for determining State lead agencies and qualified personnel responsible for transition services;

A new agreement with the Department of Elementary and Secondary Education (DESE) was finalized several years ago that describes the roles and responsibilities, including financial responsibilities, of each agency, including provisions for determining state lead agencies and qualified personnel responsible for transition services.

Specific provisions of the agreement include:

- Regular Communication - DESE and MCB representatives will meet semi-annually and as necessary to communicate and share information on topics of mutual interest including, but not limited to, legislative and regulatory changes; agency policy initiatives; resources; transition activities, including pre-employment transition services; the Massachusetts Curriculum Frameworks; and the Expanded Core Curriculum for legally blind students.
- MCB assistance with Braille Literacy and Curriculum for Legally Blind Students - MCB with the participation of the Braille Literacy Advisory Council (BrLAC) will advise DESE on issues related to Braille Literacy, the implementation of the Unified English Braille Code (UEB), the Massachusetts Curriculum Frameworks, and the Expanded Core Curriculum for legally blind students.
- Coordination with AIM Library - MCB will contact all eligible students identified through the mandatory report of legal blindness and will provide information about the purpose and benefits of the Accessible Instructional Materials Library ("AIM Library"). The AIM Library will share information with MCB about users who grant permission. MCB will provide information on available services to newly identified eligible individuals.
- DESE Guidance for School Districts - DESE, with the assistance of MCB, will provide school districts with guidance on using the Expanded Core Curriculum with eligible students. DESE, with the assistance of MCB, will develop guidance for school districts on the Workforce and Innovation and Opportunity Act of 2014; on MCB services for legally blind students and how such services can be accessed; on developing collaborative relationships with MCB caseworkers, on procedures for including caseworkers in the development of IEPs and transition plans, and accessing pre-employment transition services.
- DESE will provide local school districts with technical assistance to facilitate district compliance with G.L. c. 71B, §§ 12A-12C.
- MCB's role as the federally designated Vocational Rehabilitation Agency for Blind Individuals - A referral to MCB may be made when a student is 14 and older. MCB will determine if a student is eligible for MCB vocational rehabilitation services. If a student is eligible, MCB will coordinate the development of an Individualized Plan for Employment ("IPE") before the student leaves the school setting and will oversee implementation of the IPE, post-graduation or when the student turns 22 years of age, whichever comes first.
- For students eligible for MCB service and who are discussing transition, MCB may be invited to participate as a member of the IEP Team and may recommend transition services and goals consistent with the IPE for the student.
- MCB will provide information, as requested, to school districts about school and community-based vocational training and integrated employment (including supported employment) training for transition-aged eligible students available through MCB regional offices. MCB will designate staff in regional offices to provide technical support to school

districts on legal blindness, independent living skills development, the Expanded Core Curriculum for legally blind students as it relates to the General Curriculum, and transition services, including pre-employment transition services.

- Both DESE and MCB shall abide by state and federal laws and policies concerning student and client records confidentiality, and agency policies and procedures.
- DESE will provide school districts with technical assistance and guidance concerning special education law and policy and will monitor compliance.
- In accordance with the Rehabilitation Act of 1973 as amended by WIOA, nothing in this agreement will be construed to reduce the obligation under the Individuals with Disabilities Education Act (20 U.S.C. 1400 et seq.) of a local educational agency (LEA) or any other agency to provide or pay for any transition services that are also considered special education or related services and that are necessary for ensuring a free appropriate public education to students with disabilities.
- In accordance with IDEA, nothing in this agreement relieves MCB of the responsibility to provide or pay for any transition service that the agency would otherwise provide to students with disabilities who meet MCB's eligibility criteria.
- Disputes regarding MCB financial responsibility for services provided or recommended by MCB for blind students will be resolved by the MCB Deputy Commissioner.
- The agreement shall be in effect for ten years subject to biannual review. It may be revised upon agreement by the parties or terminated by either party upon written notice to the Commissioner of intent to withdraw.

D. procedures for outreach to and identification of students with disabilities who need transition services.

As described in Section B. above, identification and outreach are accomplished by transition planning by MCB and education personnel that facilitates the development and completion of students' individualized education programs through the Chapter 688 process.

MCB provides children's services to legally blind children under its state social services funding. Children participating in these services are referred by their social workers to vocational rehabilitation counselors when they are age 14. Referrals from this program are a major component of outreach for the provision of pre-employment transition services, transition services, and other vocational rehabilitation services.

An MCB vocational rehabilitation counselor has developed, in conjunction with the Massachusetts Federation for Children with Special Needs (the state Parent Training and Information Center), an information packet for the parents of children with visual impairments on the pre-employment transition services and transition services offered by the MCB vocational rehabilitation program.

In addition, all legally blind children and adults in Massachusetts are registered with the Massachusetts Commission for the Blind as a consequence of the state's mandatory reporting law and, thus, identified. MCB regularly reaches out to all registrants between the ages of 14

and 22 to acquaint them with the agency and its services and to offer pre-employment transition services, transition services, and other vocational rehabilitation services.

e. Cooperative Agreements with Private Nonprofit Organizations

(Formerly known as Attachment 4.8(b)(3)). Describe the manner in which the designated State agency establishes cooperative agreements with private non-profit VR service providers.

In accordance with the procedures of the Commonwealth of Massachusetts, the Massachusetts Commission for the Blind has contracts with all private, non-profit vocational rehabilitation service providers that it purchases services from. Statewide rates and technical specifications are established in these contracts for the services most commonly purchased from non-profit vocational rehabilitation services providers including vocational evaluation, supported employment, on-site job coaching and job development. These contracts are subject to competitive bidding; solicitations are posted on the COMMBUYS website maintained by the Commonwealth of Massachusetts. As required by the Rehabilitation Act, one member of the State Rehabilitation Council represents a non-profit provider. In addition, several other members happen to work for non-profit providers. During the recent years, MCB has developed enhanced public-private collaborations with the Commonwealth's significant non-profit service providers for the blind to leverage MCB's resources. The organizations include Perkins, the Carroll Center, and Massachusetts Association for the Blind (MAB) Community Services. In the fall of 2018, the MCB Commissioner held a statewide meeting for the leadership teams of MCB and of partner agencies to build closer relationships and to discuss common concerns and possible mutual initiatives at a high level.

f. Arrangements and Cooperative Agreements for the Provision of Supported Employment Services

(Formerly known as Attachment 4.8(b)(4)). Describe the designated State agency's efforts to identify and make arrangements, including entering into cooperative agreements, with other State agencies and other appropriate entities in order to provide supported employment services and extended employment services, as applicable, to individuals with the most significant disabilities, including youth with the most significant disabilities.

In October 1997, a Community-Based Employment Service (CBES) service delivery system was developed through the Executive Office of Health and Human Services Employment Services Advisory Committee. Later that year, the Massachusetts Rehabilitation Commission (MRC), the Department of Developmental Services (DDS), the Massachusetts Commission of Deaf and Hard-of-Hearing (MCDHH) and the Massachusetts Commission of the Blind (MCB) collaborated on the release of a competitive bid for CBES. It was the first interagency collaboration of its kind. Because of this effort, a supported employment consumer is able to access a system of

supports in a more streamlined fashion that incorporates collaboration and consumer choice and is outcome driven. This effort is designed to offer all reasonable and allowable supports to consumers, including extended services. Through this effort the disability agencies have a consistent pay scale, defined outcomes, and can now easily cost share the support services for people with disabilities. The CBES service delivery system continues, slightly modified, with the existing agencies, as the Competitive Integrated Employment Services (CIES) service delivery system today. In recent years, MCB has contracted with an increasing number of new providers of community-based supported employment services. The results of these services have varied, but the agency's positive experience in the cases of some consumers who have needed very intensive supported employment services. The Massachusetts Department of Developmental Services (DDS) and the Massachusetts Department of Mental Health (DMH) have over the years worked cooperatively with MCB and provided extended services to several legally blind persons that have been provided supported employment services by MCB. A *Memorandum of Agreement* with DDS that includes provisions for use of joint agency resources to ensure quality service delivery and long term supports for supported employment was executed in November 2015. This includes a formal commitment of funding from MCB for appropriate supported employment services and a commitment from DDS for funding of the long-term, ongoing employment support services when needed. The agreement also provides for cross-training of staff. In accordance with the requirements of the Rehabilitation Act, MCB executed a WIOA Cooperative Agreement with MassHealth in January 2016. In addition, the Massachusetts Rehabilitation Commission (MRC) has clarified that MCB consumers who have been rehabilitated into competitive integrated supported employment will be eligible to receive funding for on-going supports under its state-funded Extended Ongoing Supports Program. MCB is very appreciative of the help and advice that the MRC Extended Ongoing Supports Program provided and expects that the availability of this resource will increase the opportunities for supported employment for legally blind consumers who have significant secondary disabilities but do not qualify for on-going supports from another state or private agency.

g. Coordination with Employers

(Formerly known as Attachment 4.8(b)(5)). Describe how the designated State unit will work with employers to identify competitive integrated employment and career exploration opportunities to facilitate the provision of:

1. VR services; and

In recent years, MCB has participated in several hiring events with the Massachusetts Rehabilitation Commission that were sponsored by the Office of Federal Contract Compliance Programs (OFCCP). Federal contractors are required to set a hiring goal of having 7% of their employees drawn from qualified workers with disabilities by regulations promulgated in 2013. MCB has also held several smaller in-service presentations for OFCCP contractors and intends to continue its outreach to OFCCP contractors using several strategies including: participation in hiring events, scheduling group and individual in-service presentations and assistive technology

demonstrations and contact with individual OFCCP contractors on behalf of consumers who are applying for jobs.

MCB employment specialists participate in regional employment collaboratives that share information on employer needs at regular meetings. The members of these collaboratives also share job listings across agencies.

- Perkins School for the Blind, MCB and the Carroll Center continue to hold a job fair and employee education seminar. The event included approximately seventy employers who were asked to interview, mentor, provide an internship opportunity to, hire, or promote at least one blind consumer. Many of the employer's present expressed their commitment to this initiative.
- MCB developed a guide for Massachusetts business employers on tax incentives available for hiring individuals with disabilities. There are numerous tax incentives available to incentivize businesses to hire individuals with disabilities; however, they are poorly understood by many employers. Complexity is a deterrent for many potential employers of MCB consumers. Having an accessible and easy-to-follow guide will facilitate employment interaction for MCB's consumers and potential employers.

MCB is currently exploring the best avenues to solicit employers' opinions about additional cooperation to identify competitive integrated employment and career exploration and pre-employment transition opportunities for consumers and students with disabilities. The agency will use the knowledge and expertise of those Rehabilitation Council members who represent business, labor, and industry, an alliance among Perkins, the Carroll Center for the Blind, and the Massachusetts Commission for the Blind in this endeavor.

2. transition services, including pre-employment transition services, for students and youth with disabilities.

Perkins, the Carroll Center for the Blind, the Massachusetts Commission for the Blind and some of the region's best-known businesses (including large banks, hospitals, and insurance companies) continue to break down barriers to employment and expand opportunities for individuals who are blind. MCB also provides the following services to employers: Information on workplace accommodations, information on interviewing candidates who are blind, and accessibility consulting.

MCB is currently exploring the best avenues to solicit employers' opinions about additional cooperation to identify other competitive integrated employment and career exploration and pre-employment transition opportunities for students with disabilities.

MCB has had extensive experience over the past nineteen years in collaborating with employers to provide career exploration opportunities, pre-employment transition services, and transition services within its summer internship program to more than 1,000 consumers. Approximately 60 consumers participated in the program during the summer of 2023.

h. Interagency Cooperation

Describe how the designated State unit will collaborate with the State agency responsible for administering each of the following programs to develop opportunities for competitive integrated employment, to the greatest extent practicable:

1. the State Medicaid plan under title XIX of the Social Security Act;

The Massachusetts Commission for the Blind has always had a good relationship with MassHealth, the program that provides Medicaid services in Massachusetts. About 33% of the persons registered as legally blind in Massachusetts benefit from the program. MassHealth services have been key comparable benefits that have enabled many VR consumers to reach their vocational goals. The agency's state-funded Deaf-Blind Extended Supports Program also works closely with MassHealth to provide services under the Home and Community-Based waiver that can provide the underpinning of vocational outcomes in some cases. In 2023, MA Health and MCB worked together to assist shared consumers in maintaining their MA Health benefits.

2. the State agency responsible for providing services for individuals with developmental disabilities; and

The Vocational Rehabilitation Counselors in the agency's unit that provides specialized services to persons who are deaf-blind and intellectually disabled and blind work very closely with the Massachusetts Department of Developmental Services (DDS) to facilitate the development and completion of plans and services for persons with intellectual disabilities who may need DDS services in addition to vocational rehabilitation services. These specialized counselors also work closely with the Massachusetts Commission for the Deaf and Hard-of-Hearing and staff of the Helen Keller National Center to provide coordinated services to deaf-blind persons.

MCB and DDS agree to share and match data to identify all consumers who are potentially eligible for services from both agencies. When the data match was completed, approximately 1,800 consumers had been identified. A further review by DDS estimated that 400 of these consumers might be appropriate for VR services.

The two agencies have executed a *Memorandum of Agreement* that includes provisions for use of joint agency resources to ensure quality service delivery and long-term supports that result in competitive, integrated employment outcomes. This includes funding from MCB for appropriate vocational rehabilitation and supported employment services and a commitment from DDS for funding of the long-term, ongoing employment support services when needed.

3. the State agency responsible for providing mental health services.

Over the years, the Massachusetts Department of Mental Health (DMH) has worked cooperatively with MCB by providing extended services and other services to some legally blind persons that have received supported employment services and other services from MCB.

i. Comprehensive System of Personnel Development; Data System on Personnel and Personnel Development

(Formerly known as Attachment 4.10)). Describe the designated State agency's procedures and activities to establish and maintain a comprehensive system of personnel development designed to ensure an adequate supply of qualified State rehabilitation professional and paraprofessional personnel for the designated State unit, including the following:

1. Data System on Personnel and Personnel Development

A. Qualified Personnel Needs.

Describe the development and maintenance of a system for collecting and analyzing on an annual basis data on qualified personnel needs with respect to:

i. the number of personnel who are employed by the State agency in the provision of VR services in relation to the number of individuals served, broken down by personnel category;

The average caseload per MCB vocational rehabilitation counselor is 70 vocational rehabilitation consumers. Growth in MCB's consumer base has been static during the past few years. Based upon this pattern and an agency turnover rate of about 7-10%, it is projected that there will be a need for some 12 entry-level direct services staff over the next five years. The agency estimates that in FY 2023, it will serve approximately 1,300 legally blind individuals. The agency believes that numbers and types of personnel listed below are adequate and will continue to be adequate in five years, based on projections of the number of individuals to be served, including individuals with significant disabilities, the number of personnel expected to retire or leave the field, and other relevant factors.

- Administrative Staff: 1, Rehabilitation Counselors & Employment Specialists: 18, Other Direct Service (AT engineers, OM, RT, etc.): 20, Direct Service Supervisors: 4 and Clerical and Support Staff: 6

ii. the number of personnel currently needed by the State agency to provide VR services, broken down by personnel category; and

- Administrative Staff: 1, Rehabilitation Counselors and Employment Specialists: 2, Other Direct Service (AT engineers, OM, RT, etc.): 0, Direct Service Supervisors: 1 Clerical and Support Staff: 0

iii. projections of the number of personnel, broken down by personnel category, who will be needed by the State agency to provide VR services in 5 years based on projections of the

number of individuals to be served, including individuals with significant disabilities, the number of personnel expected to retire or leave the field, and other relevant factors.

- Projected vacancies over the next five years: Administrative Staff: 1 Rehabilitation Counselors: 3 Other Direct Service (AT engineers, OM, RT, etc.): 5 Direct Service Supervisors: 2 Clerical and Support Staff: 1

B. Personnel Development

Describe the development and maintenance of a system for collecting and analyzing on an annual basis data on personnel development with respect to:

i. a list of the institutions of higher education in the State that are preparing VR professionals, by type of program;

- Assumption College
- Springfield College
- University of Massachusetts at Boston

Many MCB staff have graduated from these programs over the years. One recently hired counselor has a degree in Rehabilitation Counseling from Assumption College. The agency also recently provided an internship and practicum for a rehabilitation counseling student from Springfield College.

ii. the number of students enrolled at each of those institutions, broken down by type of program; and

In a given academic year, upwards of 100 undergraduate students and 125 graduate students are enrolled in degree programs, either full-time or part-time, as rehabilitation "majors" at Assumption College, Springfield College, Salve Regina, and the University of Massachusetts at Boston.

iii. the number of students who graduated during the prior year from each of those institutions with certification or licensure, or with the credentials for certification or licensure, broken down by the personnel category for which they have received, or have the credentials to receive, certification or licensure.

Each year, upwards of 50 undergraduate students are awarded the bachelor's degree and upwards of 60 graduate level students graduate with credentials to qualify for certification by the Commission on Rehabilitation Counselor Certification and/or licensure by the Commonwealth of Massachusetts.

2. Plan for Recruitment, Preparation and Retention of Qualified Personnel

Describe the development and implementation of a plan to address the current and projected needs for qualified personnel including, the coordination and facilitation of efforts between the

designated State unit and institutions of higher education and professional associations to recruit, prepare, and retain personnel who are qualified, including personnel from minority backgrounds and personnel who are individuals with disabilities.

- As part of its ongoing In-Service Training Program, MCB's Staff Development Unit regularly conducts needs assessments of the professional staff to identify training requirements and areas needing attention. The Staff Development Unit also utilizes the resources of Technical Assistance Center at the Institute for Community Inclusion for needs assessment data; direct training programs; and referral and evaluation of trainers, lecturers, and presenters. MCB's Staff Development Unit utilizes this data to plan, budget and provide the most comprehensive training plan possible.
- MCB is a leader in the area of adaptive technology and has long utilized its in-house resources to keep its professional staff current in this area.
- Training on the Rehabilitation Act is regularly included in the annual training calendar.
- Recruitment is conducted through mechanisms such as the Massachusetts online job recruitment site and at job fairs. Preparation is accomplished through new staff orientation, supervision, and on-going training.
- MCB has had a productive relationship with the graduate rehabilitation-counseling program at Assumption College and Springfield College. MCB has been able over the years to hire a number of graduates of Assumption College and Springfield College as MCB rehabilitation counselors. MCB also has developed a positive relationship with the University of Massachusetts, Master of Science in Rehabilitation Counseling program and has hired several graduates as rehabilitation counselors. Another college, Cambridge College, offers some coursework in Rehabilitation Counseling. MCB is in contact with the college and sends job openings to the college.

3. Personnel Standards

Describe the State agency's policies and procedures for the establishment and maintenance of personnel standards consistent with section 101(a)(7)(B) and 34 CFR 361.18(c) to ensure that designated State unit professional and paraprofessional personnel are adequately trained and prepared, including:

A. standards that are consistent with any national or State-approved or -recognized certification, licensing, registration, or other comparable requirements that apply to the profession or discipline in which such personnel are providing VR services; and

In accordance with 34 CFR 361.18 c (2)(I), the highest requirements in the State applicable to a professional discipline means the highest entry-level academic degree needed for any national or State approved or recognized certification, licensing, or registration requirement. In Massachusetts, pursuant to 34 CFR 361.18 (c) (2)(I), the degree needed if a person chooses to apply for state licensure is a master's in rehabilitation counseling or a related field. Persons who

have attained a master's degree in rehabilitation counseling or have been awarded a license in rehabilitation counseling by the Board of Allied Mental Health and Human Services Professions before July 1, 1999, are deemed to have met the academic standard. Meeting the academic standard requires the attainment of a master's degree in rehabilitation counseling or a related field from a recognized educational institution and successful completion of a graduate-level course in each of the following areas:

- Job Placement or Occupational Information;
- Vocational Assessment and Evaluation;
- Vocational Counseling; and
- Medical or Psychosocial Aspects of Disabilities

The Massachusetts Commission for the Blind defines a person with a master's degree in a related field as one who has a master's degree with a major in Counseling, Guidance, Psychology, Education, Special Education, Social Work, Human Services, Human Development, Sociology, or in a major that has been determined to be comparable by the Massachusetts Commission for the Blind. Some years ago, the Massachusetts Commission for the Blind developed an Action Plan to Comply with Section 101(a)(7) of the Rehabilitation Act in conjunction with the Rehabilitation Services Administration. This plan called for completion of a plan by which all existing Vocational Rehabilitation Counselors (VRCs) who did not have a master's degree in rehabilitation counseling or a related field would be on a mandatory schedule to fulfill this academic requirement, consistent with the ongoing provisions of federal law and in accordance with the MCB State Division of Human Resources and labor union policies and/or agreement(s). All vocational rehabilitation counselors who did not meet this standard have now completed additional graduate-level work to meet CSPD requirements. The Massachusetts Commission for the Blind has for several years begun to apply the master's-level standard to new hires, when possible.

B. the establishment and maintenance of education and experience requirements, in accordance with section 101(a)(7)(B)(ii) of the Rehabilitation Act, to ensure that the personnel have a 21st century understanding of the evolving labor force and the needs of individuals with disabilities.

MCB actively recruits new rehabilitation staff from area graduate-level college and university programs. The agency also provides a number of short-term training opportunities for vocational rehabilitation staff. During FY 2023 MCB conducted more than thirty in-service training programs on topics such as: ethics, diversity, crisis intervention, eye diseases, the Expanded Core Curriculum, autism, and work incentives.

On March 24, 2023, the Massachusetts Commission for the Blind (MCB) held its MCB Visions of Collaboration Conference for Teachers of the Visually Impaired, MCB VR counselors and supervisors, and other special education staff. One hundred and fifty professionals attended. The focus of the conference was on Program innovation and future ideas and transition. The agenda included presentations on the importance of orientation and mobility in the transition

process, APH expanded core curriculum, tools for transition planning, 5th year of high school, a less conventional path to college success, IEP improvement project, Compass: a new take on college readiness planning and services offered by MCB; and preparing for college. Employers, special education staff, students, and MCB staff were among the presenters. The participant evaluations continue to be very positive for this event.

Agency staff also attended several training courses and programs provided by the Commonwealth and other private institutions. In all, MCB staff participated in 77 different training events.

4. Staff Development.

Describe the State agency's policies, procedures, and activities to ensure that, consistent with section 101(a)(7)(C) of the Rehabilitation Act, all personnel employed by the designated State unit receive appropriate and adequate training in terms of:

A. System of staff development

A system of staff development for professionals and paraprofessionals within the designated State unit, particularly with respect to assessment, vocational counseling, job placement, and rehabilitation technology, including training implemented in coordination with entities carrying out State programs under section 4 of the Assistive Technology Act of 1998; and

The Massachusetts Commission for the Blind has for several years, begun to apply the master's-level standard to new hires, if possible. In addition, the Massachusetts Commission for the Blind supports graduate-level training for its professional staff through its Staff Development Unit. MCB actively recruits new rehabilitation staff from area graduate-level college and university programs. The agency also provides a number of short-term training opportunities for vocational rehabilitation staff.

During FY 2023 MCB conducted more than 15 in-service training programs on topics such as: ethics, diversity, crisis intervention, eye diseases, the Expanded Core Curriculum, autism, and work incentives.

The agency also developed and sponsored a conference called "Vision of Collaboration" on pre-employment transitions services. More than 150 Teachers of the Visually Impaired, MCB VR counselors and supervisors, and other special education staff attended.

The Steering Committee of the Massachusetts Workforce Board works with the Steering Committee members, including the MassHire Department of Career Services, the Massachusetts Rehabilitation Commission and the Massachusetts Commission for the Blind, to coordinate cross-training for staff. Additional cross-training on labor market information and technology tools is a high priority. Cross-training staff is available across all partners (economic development organizations, MassHire Workforce Boards, MassHire Career Centers, TANF-SNAP,

adult education, vocational rehabilitation, business services, Veterans, and other key programs) on the online technology tools available to individuals across programs including TORQ, Career Information System, etc. MCB VR staff members also participate in webinars offered by the Job Driven Vocational Rehabilitation Technical Assistance Center (JDVRTAC) and the Workforce Innovation Technical Assistance Center (WINTAC).

MCB intends to take advantage of any other webinars and training opportunities on workforce and labor force needs.

The agency also offers participation in an Aspiring Supervisor Certificate Program in order to prepare interested staff to apply for supervisory positions that are expected to become vacant within the next few years.

B. Acquisition and dissemination of significant knowledge

Procedures for the acquisition and dissemination of significant knowledge from research and other sources to designated State unit professionals and paraprofessionals.

The Commission acquires and routinely disseminates rehabilitation materials and research to staff such as the latest publications from the Institute on Rehabilitation on Issues, training materials from the Research and Training Centers, training guides and resource materials produced by recipients of RSA training grants, and literature from the American Foundation for the Blind and the National Research and Training Center on Blindness and Low Vision at Mississippi State University. In addition, each counselor and supervisor have a personal computer giving them access to a wide variety of software applications and websites to acquire rehabilitation materials and research reports.

5. Personnel to Address Individual Communication Needs

Describe how the designated State unit has personnel or obtains the services of other individuals who are able to communicate in appropriate modes of communication with or in the native language of applicants or eligible individuals who have limited English speaking ability.

MCB has access to interpreters and are able to accommodate any language needed. The MCB staff also speaks a number of languages including Spanish, French, ASL and the language of the Congo to name a few.

6. Coordination of Personnel Development Under the Individuals with Disabilities Education Act

As appropriate, describe the procedures and activities to coordinate the designated State unit's comprehensive system of personnel development with personnel development under the Individuals with Disabilities Education Act.

The Memorandum of Understanding between MCB and the Department of Elementary and Secondary Education contains provisions to explore ways to develop cross-training opportunities on transition and pre-employment transition services. For the fourth year, the agency also developed and sponsored a conference called “Vision of Collaboration” on pre-employment transitions services. More than 150 Teachers of the Visually Impaired, MCB VR counselors and supervisors, and other special education staff attended.

MCB has developed Memoranda of Understanding with both the Department of Mental Health and the Department of Developmental Services. These *Memoranda of Understanding* include provisions for the cross training of staff to improve shared client service delivery. In 2017 the Department of Developmental Services delivered training for all VR staff and the Department of Mental Health provided training in 2018. In 2017 MCB delivered training “Adjustment to the Challenges of Vision Loss” for the Department of Developmental Services at their annual “A FOCUS on Vision” conference. In 2017 the MA Office on Disability delivered a training program for all VR staff on ADA Training: Employer Responsibilities. MCB continues to deliver cross training for all Department of Transitional Assistance’s Service Coordinators who are responsible for the effective service delivery of agency services for clients with disabilities. MCB continues to provide training on the Expanded Core Curriculum under IDEA. In addition, MCB has had VR and Pre-ETS staff attend ongoing training at the Federation for Children with Special Needs.

j. Statewide Assessment

1. Provide an assessment of the rehabilitation needs of individuals with disabilities residing within the State, particularly the VR services needs of those:

A. with the most significant disabilities, including their need for supported employment services;

MCB, in consultation with the MCB SRC and a number of other agencies serving the blind, commissioned a comprehensive needs assessment that was completed in 2005. The methodology used for the assessment was a telephone poll conducted by UMass Poll of a random sample of registrants. The MCB RC was satisfied with the original comprehensive needs assessment conducted for MCB by the UMass Poll, so it was decided that the comprehensive needs assessment would be replicated by MCB staff. Other needs assessments were completed during FY 2009 and FY 2012. A fourth needs assessment, using the same questions and methodology was undertaken in 2014 and completed in 2015. In 2022 MCB in partnership with Human Services Research Institute (HSRI) completed an Assistive Technology survey, this provided an understanding of its consumers’ use of and support needs for assistive technologies and devices. In 2023 MCB worked with MassINC Polling Group to complete an all-consumer survey. This project surveyed consumers’ visual impairments, their use of and satisfaction with MCB services and various demographics.

The MCB RC worked with the agency on the development and implementation of the 2018 comprehensive needs assessment methodology in line with the requirements and focus of WIOA on competitive integrated employment. One focus group was held, and a web-based survey was developed and conducted.

The full analysis and report of the most recent comprehensive needs assessment is below.

Massachusetts Commission for the Blind Comprehensive Needs Assessment 2018

Executive Summary

This report describes research undertaken by the Massachusetts Commission for the Blind (MCB) to investigate the needs, interests, and opinions of the legally blind in Massachusetts. The contents of this report are intended to inform MCB and relevant organizations that work with blind residents for the purpose of planning and coordination of services as well as of building awareness about issues and rehabilitation needs facing legally blinded consumers.

Data for the study was drawn from an online survey using Google Forms. A sample of 1,950 blinded residents across all age groups was sent an email with the online survey link. A total of 167 responses were received. The response rate is about 9%. The survey questionnaire contains 47 questions in total.

Key Findings in Brief

Demographic Highlights

➤ The survey sample was slightly young, mostly white, highly educated, and had good self-rated health.

Employment

➤ Most of survey respondents (76%) were not working or just working part-time. However, only half of them were interested in finding a job or more work.

➤ In general, respondents' awareness of the importance of means to help them get employed was relatively low.

Travel and Safety

➤ Respondents were, in general, able to travel safely in familiar areas, both in indoor and outdoor areas. However, they felt much less safe to travel in unfamiliar outdoor areas and to use public transportation.

➤ The primary means of transportation were family and public transportation. And the majority reported their transportation needs were met.

Communication and Information

➤ Computer was the most preferred method of communication. And most people considered computer skills to be very important for job market.

➤ However, about 20% of respondents were not using a computer. The most common reason was “don’t know how”.

➤ Although 70% of respondents used multiple types of assistive technology, about 20% of respondents were not using assistive technology.

➤ Only a small share (17%) reported a need for vocational counseling.

➤ MCB was the most helpful agency that provided the most assistance.

Recommendations

Readers are cautioned against drawing strong conclusions based on sampling results with small numbers of respondents. From the results of this survey, services are needed in each area mentioned in this study. We also included 16 questions about the Transition and Pre-employment Transition Services Program (for young adults aged 14-21). However, only 25 respondents answered. In any future study, it is suggested to separate respondents who have retired from those who have not worked before (e.g., students) in the responses. In addition, it is crucial to take accessibility into account when conducting any online survey in future research.

Lastly, it would be helpful to carry out surveys using other methods (i.e., in person interview, focus group, etc.) rather than only an online survey. Electronic means of information distribution, such as website or email, may not be the most effective in reaching people with vision impairment, especially for older blind adults.

Introduction

There were 28,000 legally blind registrants in Massachusetts in 2018. And there were 4,144 registrants who had email addresses recorded. The purpose of this survey was to investigate the needs, opinions, and issues for the Blind community in MA and to inform MCB and relevant organizations to plan and to coordinate vocational rehabilitation services.

Demographics

This survey had 167 respondents, with 53% Male and 41% Female, with 1% indicating “I do not identify as male or female” and 4% not answering. About one-third of survey respondents (31%) were 65 and over years old, compared to 65% over 65 years old in 2014 survey. 13% were aged 22-35; 8% aged 36-45; 11% aged 46-55; 16% aged 56-64. Young adults between 14 and 21 years old, which were the targeted population for the Transition and Pre-employment Transition Services Program, made up 15% (25 respondents). 3% were under age 14 and 4% preferred not to answer.

The survey respondents were somewhat diverse with respect to race and ethnicity. The large majority of Massachusetts legally blind residents reported their race as White (71%), followed by African American (8%). Approximately 7% of respondents reported Hispanic ethnicity. A small portion (2%) reported an Asian race. The remaining 11% did not report or did not know their race.

The respondents’ highest education attainment was asked. Approximately 81% of respondents completed high school or higher education. About 12% of respondents reported their highest education attainment as less than high school. 25% reported post-college graduate education; 22% college graduation; 20% high school graduation; 14% some college. The remaining 6% of respondents’ highest education attainment was missing. The result indicates that these legally blind registrants in Massachusetts are well educated on average.

A large share of respondents (80%) reported their overall health as good or excellent. Only 3% of respondents reported poor overall health. (31% excellent; 17% fair; 49% good; 1% missing.)

Employment

More than half of the respondents (63%) reported not working at all at the survey point of time. This group included retired, not applicable, or unemployed. About one-fifth respondents (22%) were working full-time, compared to 13% working part-time, with 2% missing an answer.

Among those respondents who are part-time or not working at all (n=126), about 57% of them were interested in finding a job or more work (21% “somewhat interested” and 36% of them “very interested”). The remaining 43% of respondents showed no interest in finding a job or more work (34% “not interested at all” and 9% “not very interested”).

For all survey respondents, no matter whether they were currently employed or unemployed, about 40% of them believed that it is very important to learn about jobs that people who are blind have done successfully, and another 28% of them also considered that it is somewhat important. On the contrary, about one-third (30%) of respondents reported that it was not very important (10%), or it was not important at all (20%) to learn about jobs that blind people have done successfully. 2% did not answer.

Similarly, about 58% of respondents reported that “Deciding what kind of work would be possible for you” was very important (36%) or somewhat important (22%) while the remaining 40% of them thought that it was not very important (10%) or not important at all (30%). 2% did

not answer. Regarding the importance of training in a rehabilitation center, less than half (42%) of respondents reported “very important” (15%) or “somewhat important” (27%). Most respondents (56%) answered “not very important” (20%) or “not important at all” (36%). The remaining 2% did not answer this question.

When it comes to the importance of employment program such as supported employment that provides a job coach, it is reported that 41% of respondents thought it was “very important” (23%) or “somewhat important” (17%); whereas 58% of respondents thought it was “not very important” (21%) or “not important at all” (37%). 2% did not answer.

Data from the questions about employment suggests that it is necessary and urgent to raise respondents’ awareness of means to learn about and obtain employment.

When asked about the most important thing in the past that led to you getting a job, approximately 18% of respondents chose “right place at the right time”, followed by “help from family and friends” (14%) and “help from an agency” (14%). A small portion of respondents answered, “school placement service” and “answering an ad”, 6% and 5%, respectively. About 30% of respondents answered “other”, which included self-employed, professional network, or not applicable (i.e., students never worked before, not legally blind then, or retired). The remaining 13% of respondents did not answer this question.

Among the most important factors that led to success on the job, 29% of respondents considered job skills as the most important thing, followed by “hard work” (25%). 11% chose “ability to get along with others”; 7% “a mentor or co-worker”. It is noted that 15% of respondents answered “other”, most of whom wrote down “more than one factor”. It would be better to include this question as a multiple-choice question in the future. 14% did not answer this question.

Among those who worked, only 22% of respondents used a MassHire Career Center at some level (3% “often and 19% “some”). The majority of respondents (74%) used MassHire Career Center not often (21%) or not at all (53%). 3% did not answer.

Travel and Safety

Approximately 88% of respondents reported that they could safely travel at home and in familiar indoor areas (69% “very safely” and 19% “somewhat safely”). The remaining 8% of respondents said that they felt “not very safely” (3%) or “not safely at all” (5%) about navigating at home and indoor familiar areas. 4% did not answer.

As for traveling in outdoor familiar areas, about 81% of respondents said, “very safely” (46%) or “somewhat safely” (35%). A slightly larger share of respondents (16%) answered “not very safely” (8%) or “not safely at all” (8%) relative to travel outdoors in familiar areas. 4% did not answer.

In unfamiliar areas outdoors, 15% of respondents said that they could travel very safely and 46% of them said that they could travel somewhat safely. It is noted that 37% of respondents said that they did not feel very safe (17%) or did not feel safe at all (20%) when traveling in unfamiliar areas outdoors. 3% did not answer.

About one-third of respondents (28%) felt very safe when traveling by public transportation, while the other one-third (35%) felt somewhat safe. It is important to note that another one-third (30%) of respondents felt not very safe (16%) or not safe at all (14%) to use public transportation. 7% did not answer.

The most common source of transportation for the survey respondents was family, reported by 44%, followed by public transportation (25%). The third primary means of transportation was the RIDE (14%). Ride sharing (e.g., Uber/Lyft) made up about 8%. Another 5% of respondents reported friends as their primary means of transportation. Only 1% of respondents used taxis as their primary means of transportation. 3% did not answer.

Most of respondents (84%) believed that their transportation needs were met (40% very well and 44% somewhat). Still, 12% of respondents reported that their transportation needs were “not met very well” (11%) or “not met at all” (1%). 4% did not answer.

Communication and Information

The most preferred method of communication is through computer, reported by 58% of respondents. Large print ranked as the second preferred information format for communication, making up 21%. It is noted that 15% of respondents had no ability to read at the survey time. A small portion (3%) of respondents preferred braille (2%) or cassette tape (1%) as a means of communication. 3% did not answer.

59% of respondents said that necessary support for education was very available (26%) or somewhat available (33%) to assist them in pursuit of education. However, 28% of respondents indicated that support for their education was not available; 12% “not very available” and 16% “not at all available”. A relatively large portion of respondents (13%) did not answer this question.

About eight out of ten respondents (78%) were currently using a computer, laptop, or tablet. But still about 19% of respondents were not using a computer, laptop, or tablet. 3% did not answer similarly, when it comes to usage of assistive technology, about 77% of respondents use assistive technology. The rest (20%) of respondents do not use assistive technology. 2% did not answer. Among the 129 respondents who use assistive, 28% said they use large print. About 69% of respondents answered “other” to this question. It is found in the “other” responses that respondents used more than one type of assistive technology. (In future study, it might be better to set this question as a multi-choice question.) 2% answered “braille” and 2% did not answer.

Among the 31 respondents who don't use a computer, the most common three reasons for not using a computer included: "don't know how" (32%), "can't see the screen" (29%), and "can't afford one" (23%). About 10% of respondents said that they were not interested in using a computer. 3% of them reported that they can't type. 3% did not answer.

About three-quarters (75%) of respondents considered that computer skills were very important (68%) or somewhat important (6%) for the job market. However, 16% of respondents said that computer skills were not important at all for job market. 7% did not answer.

Less than one-fifth (17%) of respondents thought that there is a need for vocational counseling. Half of respondents (50%) said there is no need for vocational counseling. And 28% of respondents report themselves as not sure whether there is a need for vocational counseling or not. 5% did not answer.

65% of respondents chose the Massachusetts Commission for the Blind (MCB) as the agency that provided them with the most help relating to visual impairment. Also, it is noted that about 11% of respondents said that more than one organization or governmental agency helped them most with issues related to visual impairment. 7% cited Perkins School for the Blind; 4% the Carroll Center for the Blind; 4% MAB Community Services; 1% Recording for the Blind and Dyslexic (Learning Ally); 1% MassHire Career Center; 1% National Braille Press. 6% did not answer.

As part of the comprehensive needs assessment, MCB conducted a focus group at a consumer conference in 2017. The most mentioned needs were orientation and mobility training and promptness of services.

B. who are minorities;

- 17% of the respondents to the Comprehensive Needs Assessment Survey identified themselves as members of minority groups. Their reported needs did not differ significantly from the other respondents.
- In recent years, MCB has seen an increase in African American, Hispanic, and Asian consumers as well as consumers who do not speak English fluently. For FY 2013, the RSA minority background service indicator for MCB was .89. For FY 2019, the RSA minority background service indicator for MCB was .91. 30% of the consumers currently receiving VR services from MCB are members of minority populations.
- The agency's needs assessment studies and public hearings have for a number of years identified the lack of availability of English as a Second Language (ESL) instruction for blind persons as a very serious problem since so many ESL programs use a picture-based methodology. MCB has also continuously advocated for the availability of English as a Second Language instruction in accessible media. MCB advises ESL programs on resources for accessible instructional materials through organizations such as the American Printing

House for the Blind. The agency believes that the increased partnership under WIOA with Adult Education and Literacy programs will facilitate cooperation to address this long-standing problem.

C. who has been unserved or underserved by the VR program;

Young adults between 14 and 22 years old made up 15% of the respondents. Their reported needs did not differ significantly from the other respondents. However, Congress, RSA, and MCB have clearly identified youth as an underserved group in light of their needs for pre-employment transition services and transition services. The MCB SRC agreed with the agency's proposal for a separate needs assessment survey conducted in 2016 that was sent out for parents to fill out for this population (age 14-22) about their educational services and pre-employment transition services, transition services and vocational services. Analysis of this survey indicates that there is a clear need for pre-employment transition services. MCB plans to conduct future surveys tailored to the needs of youth and students with disabilities.

D. who has been served through other components of the statewide workforce development system; and

Among those who worked, only 22% of respondents used a MassHire Career Center at some level (3% "often and 19% "some"). The majority of respondents (74%) used MassHire Career Center not often (21%) or not at all (53%).

MCB's practice is to refer all VR consumers to MassHire Career Centers. MCB has, over the years, offered to place staff on-site at the centers, to provide staff training on blindness and accessibility, and to provide consultation career centers on the accessibility of materials and software. With the implementation of WIOA, the MassHire centers are more open to using MCB as a resource (rather than referring the consumer back) than they have been in the past.

E. who are youth with disabilities and students with disabilities, including, as appropriate, their need for pre-employment transition services or other transition services.

Young adults between 14 and 22 years old made up 15% of the respondents. Their reported needs did not differ significantly from the other respondents. However, Congress, RSA, and MCB have clearly identified youth as an underserved group in light of their needs for pre-employment transition services and transition services. The MCB SRC agreed with the agency's proposal for a separate needs assessment survey conducted in 2016 that was sent out for parents to fill out for this population (age 14-22) about their educational services and pre-employment transition services, transition services and vocational services. Analysis of this survey indicates that there is a clear need for pre-employment transition services. MCB plans to conduct future surveys tailored to the needs of youth and students with disabilities.

Major Findings of the 2016 Pre-Employment Transition Services Needs Assessment Survey:

AWARENESS OF PRE-EMPLOYMENT TRANSITION SERVICES - There is a general lack of awareness among consumers and their families of the availability of pre-employment transition services:

- Only 42.7% or 50 consumers were aware of cooperation or coordination between their school and Massachusetts Commission for the Blind in providing or planning services for them.
- Only 29.2% or 33 consumers have been offered transition or pre-transition employment services by Massachusetts Commission for the Blind counselor.
- Only 28.6% or 32 consumers have been offered transition or pre-transition employment services by their school system.
- 33.3% or 39 consumers were not aware that Massachusetts students of age 14-22 received special education services and had Individualized Education Programs (are on an IEP) or 504 Plan which were eligible for pre-employment transition services and transition services.

LOW PARTICIPATION IN VOCATIONAL REHABILITATION SERVICES - Only 23.7% of the respondents were receiving vocational rehabilitation services from the Massachusetts Commission for the Blind. This is despite the fact that the agency offers vocational rehabilitation services to each person registered as legally blind at the age of 14. There is a clearly a need for more effective outreach. The survey was used as an element of MCB's intensified outreach to students. In response to a question, 112 or 73.2% of the respondents indicated that they would like more information about transition and pre-employment transition services, and 83 (72.2%) of them responded that they would like to be contacted by a Massachusetts Commission for the Blind counselor. All requests were referred to the appropriate region to contact the consumer.

2. Identify the need to establish, develop, or improve community rehabilitation programs within the State; and

Massachusetts has numerous well-regarded community rehabilitation programs. There are several that specialize in serving persons who are blind or visually impaired: the Perkins School for the Blind, the Carroll Center for the Blind, the Lowell Association for the Blind, and MAB Community Services. In the 2018 Comprehensive Needs Assessment, respondents were asked: "What organization or governmental agency provides you with the most help relating to your visual impairment?" While 65% of respondents named MCB as the organization that provides the most help relating to their visual impairment, 7% named the Perkins School. Others named Carroll Center for the Blind (4%), MAB Community Services (4%), but 11% of respondents received help relating to their visual impairment from other organizations that were not listed.

3. Include an assessment of the needs of individuals with disabilities for transition career services and pre-employment transition services, and the extent to which such services are

coordinated with transition services provided under the Individuals with Disabilities Education Act.

Young adults between 14 and 22 years old made up 15% of the respondents. Their reported needs did not differ significantly from the other respondents. However, Congress, RSA, and MCB have clearly identified youth as an underserved group in light of their needs for pre-employment transition services and transition services. The MCB SRC agreed with the agency's proposal for a separate needs assessment survey conducted in 2016 that was sent out for parents to fill out for this population (age 14-22) about their educational services and pre-employment transition services, transition services and vocational services. Analysis of this survey indicates that there is a clear need for pre-employment transition services. MCB plans to conduct future surveys tailored to the needs of youth and students with disabilities.

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k. Annual Estimates

Describe:

1. The number of individuals in the State who are eligible for services;

The number of potentially eligible legally blind persons in Massachusetts is approximately 30,000, the number of persons currently registered as legally blind; approximately, 75% of the registrants are aged 65 and older.

2. The number of eligible individuals who will receive services under:

A. The VR Program;

The Massachusetts Commission for the Blind estimates that approximately 1,200 legally blind individuals per year will receive VR services as active consumers during FFY 2023. In October 2017, MCB established a new eligible category for individuals with low vision with a progressive visual impairment (including dual sensory loss) and a diagnosis leading to legal blindness. MCB shall provide all VR services to individuals who qualify for services under the low vision category in accordance with the Rehabilitation Act of 1973, as most recently amended. This improves the opportunity for the caseload to grow substantially. The definition of legal blindness in Massachusetts is: A person is legally blind if his/her visual acuity is, with correction, 20/200 or less in the better eye, or if, regardless of visual acuity, the peripheral field of his/her vision is reduced to a radius of 10 degrees or less. The definition for the new category includes a visual acuity of 20/70 or less in the better eye after best correction, due to a condition that is expected to lead to legal blindness; or a visual field no greater than 40 degrees' radius in the better eye with correction, due to a condition that is expected to lead to legal blindness.

B. The Supported Employment Program; and

It is estimated that 15-25 individuals with the most significant disabilities will be provided with Supported Employment services.

C. each priority category, if under an order of selection;

The Massachusetts Commission for the Blind is not under an Order of Selection and does not anticipate that an Order of Selection will be necessary in FFY 2023.

3. The number of individuals who are eligible for VR services, but are not receiving such services due to an order of selection; and

The Massachusetts Commission for the Blind is not under an Order of Selection and does not anticipate that an Order of Selection will be necessary in FFY 2023.

4. The cost of services for the number of individuals estimated to be eligible for services. If under an order of selection, identify the cost of services for each priority category.

The projected annual cost of services for FFY 2023 will be approximately \$10,700,000. About \$7,000,000 will be from Section 110, the Basic Vocational Rehabilitation Program. In the event federal funds for Supported Employment are not available in FFY 2023, MCB will utilize federal and state vocational rehabilitation funds instead.

I. State Goals and Priorities

The designated State unit must:

1. Identify if the goals and priorities were jointly developed

Identify if the goals and priorities were jointly developed and agreed to by the State VR agency and the State Rehabilitation Council, if the State has a Council, and jointly agreed to any revisions.

Goals and priorities were jointly developed and agreed to by the Massachusetts Commission for the Blind and the Massachusetts Commission for the Blind State Rehabilitation Council.

2. Identify the goals and priorities in carrying out the VR and Supported Employment programs.

MCB State Plan Goals and Priorities Jointly Developed with the Rehabilitation Council 2019

Goal I: To have sufficient resources to serve all eligible individuals, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities include, but are not limited to:

Monitor the agency budget and regularly advocate full funding of the VR program to ensure that in the years ahead the MCB can carry out its obligations to its many consumers. A measure for evaluation is the amount of state vocational rehabilitation funds appropriated by the Massachusetts Legislature.

Monitor the allocation of funds for the Deaf-Blind Extended Supports Program and the Supported Employment Program. A measure for evaluation is the amount of state funds appropriated by the Massachusetts Legislature for the agency's state-funded Deaf-Blind

Extended Supports Program. Some of these funds are used for on-going supported employment services after VR services are completed.

Goal II: To develop more employment options for VR consumers, including supported employment, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities include, but are not limited to:

Develop and implement plans to increase training opportunities for transition and pre-employment transition) consumers who are not going to college.

Continue and expand the agency's internship program for legally blind students and youth who are attending college and high school graduates who are not going to college or who are "out of school" youth with the result that the number of students and youth participating increases each year. Coordinate the agency's internship program with other pre-employment transition services.

Expand and develop a wide range of pre-employment transition services to enhance transition and employment opportunities for students who are legally blind and for potentially eligible students with disabilities as mandated by the Workforce Innovation and Opportunity Act (WIOA).

Devote re-allotment funds to the continuance of the "Employment Now Initiative" program that has demonstrated a high success rate for employment outcomes for its participants.

Coordinate with the other components of the statewide workforce development system to better enable them to provide appropriate assistance to individuals who are legally blind by: recommending and helping to fund appropriate assistive technologies for MassHire Career Centers; offering to provide all MassHire Career Centers with guidance regarding their accessibility to visually-impaired consumers; providing on-site VR services to legally blind consumers who have scheduled appointments at MassHire Career Centers; providing training about blindness and visual impairment to the workforce development agencies; providing consultation to workforce development staff; working with workforce development agencies to develop apprenticeship and on-the-job training opportunities for legally blind consumers; identify job-driven training opportunities for legally blind consumers; and developing an improved referral process among the partner agencies.

Goal III: Increase Outreach to Enroll Additional Eligible VR Consumers Statewide based upon estimates that a significant number of qualifying consumers are not presently enrolled.

Priorities, including, but not limited to:

- Establish additional mediums for creating increased MCB exposure by:

- Explore the use of RSA Innovation & Expansion funding to increase outreach.
- Reevaluate the effectiveness of the present methodologies for conducting MCB consumer satisfaction surveys, and adjust, as appropriate.
- Explore the outcomes derived from the present Peer Mentoring program to determine the potential value for expanding the program.
- Recruit and train successful MCB VR alumni as ambassadors to conduct outreach to unenrolled consumers.

Goal IV: To help legally blind persons, including students and potentially eligible students, to develop and increase the independence needed to be successful in competitive employment, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities:

- Advocate and educate consumers and public officials on pedestrian safety issues which impact travel by pedestrians who use a white cane or service dog to seek and maintain employment.
- Advocate for better access to and improvement of public transportation and paratransit systems in order to increase the employment outcomes of persons who are legally blind.
- Increased focus on career readiness around remote and hybrid work settings. This involves being able to use teleconferencing, messaging, shared documents, and other related applications.
- Increase access to computers and basic keyboarding skills in order to enable more MCB registered consumers to acquire elementary job readiness skills.
- Increase consumers' access to adaptive equipment as measured by the number served by the agency's Technology for the Blind Unit or referred to the Carroll Center's training program.
- Increase pre-employment transition, transition, and college students' access to educational materials, resources and websites.
- Increase and adjust Assistive Technology training for working age MCB consumers to support those currently working to maintain or advance their employment opportunities.
- Improve job readiness technology skills for those MCB consumers hoping to enter or reenter the competitive workforce.
- Advocate for improved accessibility of federal and state government and private internet sites and documents.

Goal V: Increase the effectiveness and efficiency of vocational rehabilitation services delivery, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities include, but are not limited to:

- Annually review the agency performance on RSA standards and indicators and on other statistical measures of effectiveness and recommend actions to improve performance when appropriate.
- Improve communication and collaboration between VR counselors in MCB's regional offices and VR counselors in MCB's Deaf-Blind Extended Support Unit to enhance services to consumers.
- Improve communication and collaboration among MCB staff (VR counselors, children's service workers and social workers) in order to facilitate services to pre-employment transition consumers who have reached their fourteenth birthday and to identify on a case-by-case basis the most appropriate departments within MCB and programs offered by service providers to meet these individuals' needs.
- Improve communication and collaboration between MCB VR counselors and all other state, federal, contracted and private agencies providing technology, vocational training and employment services to MCB consumers, including eligible and potentially eligible pre-employment transition consumers.
- Provide appropriate after-school assistive technology and orientation and mobility services as pre-employment transition services to eligible and potentially eligible middle and high school students.
- Provide appropriate job exploration and counseling pre-employment transition services such as mentorships and exposure to real life career information.
- Provide appropriate work readiness pre-employment transition services in areas such as financial management, budgeting, and social skills.

3. Ensure that the goals and priorities are based on an analysis of the following areas:

The goals and priorities are based on an analysis of the following areas:

A. The most recent comprehensive statewide assessment, including any updates;

The Rehabilitation Council (MCB RC) has continued to review the consumer satisfaction studies and the comprehensive needs assessment on a routine basis and the members and the agency have used them in developing the goals and priorities.

B. the State's performance under the performance accountability measures of section 116 of WIOA; and

The agency and the Rehabilitation Council look forward to using the performance accountability measures of section 116 of WIOA and the baseline measurements when developed in

conjunction with RSA. WIOA and its *State Plan* requirements have been discussed at each quarterly meeting of the Rehabilitation Council since its enactment. The agency and the council have developed new goals and priorities and plans for innovation and expansion based on the law.

C. other available information on the operation and effectiveness of the VR program, including any reports received from the State Rehabilitation Council and findings and recommendations from monitoring activities conducted under section 107.

The agency and the Rehabilitation Council used the results of their review of consumer satisfaction studies and reports of the effectiveness of the VR program and the agency's performance on the RSA Standards and Indicators in their development of the goals and priorities.

m. Order of Selection

Describe:

1. Whether the designated State unit will implement and order of selection. If so, describe:

A. The order to be followed in selecting eligible individuals to be provided VR services.

The Massachusetts Commission for the Blind is not under an Order of Selection and does not anticipate that an Order of Selection will be necessary in FFY 2023.

B. The justification for the order.

The Massachusetts Commission for the Blind is not under an Order of Selection and does not anticipate that an Order of Selection will be necessary in FFY 2023.

C. The service and outcome goals.

The Massachusetts Commission for the Blind is not under an Order of Selection and does not anticipate that an Order of Selection will be necessary in FFY 2023.

D. The time within which these goals may be achieved for individuals in each priority category within the order.

The Massachusetts Commission for the Blind is not under an Order of Selection and does not anticipate that an Order of Selection will be necessary in FFY 2023.

E. How individuals with the most significant disabilities are selected for services before all other individuals with disabilities; and

The Massachusetts Commission for the Blind is not under an Order of Selection and does not anticipate that an Order of Selection will be necessary in FFY 2023.

2. If the designated State unit has elected to serve eligible individuals, regardless of any established order of selection, who require specific services or equipment to maintain employment.

The Massachusetts Commission for the Blind is not under an Order of Selection and does not anticipate that an Order of Selection will be necessary in FFY 2023.

n. Goals and Plans for Distribution of title VI Funds.

1. Specify the State's goals and priorities for funds received under section 603 of the Rehabilitation Act for the provision of supported employment services.

One of MCB's major goals for FY 2023 is to continue to expand provision of supported employment services, particularly to students and youth with disabilities. This will be a formal, explicit FY 2023 objective for each VR manager overseeing the delivery of direct consumer services and will be incorporated into his or her individualized goals and objectives document for the year. It is projected that a number of additional consumers (statewide) will be evaluated for their potential participation in supported employment programming and 20-30 of them will be appropriately served under the Supported Employment Program.

MCB will increase its outreach efforts to individuals with blindness and intellectual disabilities, multiple disabilities, acquired brain injury including individuals not eligible for the extended supports from the Department of Mental Health or the Department of Developmental Services. The clarification that MCB consumers who have been rehabilitated into competitive integrated supported employment will be eligible to receive funding for on-going supports under the Massachusetts Rehabilitation Commission's state-funded Extended Ongoing Supports Program will be extremely helpful.

The agency has during the past several years created several new positions in its Deaf-Blind Extended Supports Unit. A major objective of MCB's Deaf-Blind Extended Supports Unit is to better provide specialized, intensive VR services to a group of multi-disabled consumers who are thought to be currently underserved; these are consumers who are not deaf or intellectually disabled but have very significant disabilities such as mental illness or brain injury in addition to blindness. Emphasis on serving deaf-blind and deaf-blind and intellectually disabled consumers who are leaving Special Education programs provided by the public schools and providing appropriate adult services, including supported employment, will continue. The agency's Deaf-Blind Extended Supports Unit has a goal that fifteen such consumers will be served under Title VI programming in FFY 2023.

The agency's experience indicates that supported employment can be a very effective service for deaf-blind consumers and also for consumers with blindness and multiple disabilities. In

past years, MCB has been involved with several other agencies, including the Massachusetts Rehabilitation Commission, in a successful effort to expand the number of providers of supported employment services. This effort has resulted in more choices for consumers; performance-based contracting has been adopted as an incentive to promptness and flexibility in service provision and to successful outcomes. While MCB has provided staff training on supported employment a number of times over the years, the agency has many new VR counselors. The agency, in collaboration with the TACE Center, conducted a training program on supported employment for all VR staff in November 2014 and will repeat this training over the next several years.

MCB will distribute any FFY 2023 Title VI resources from a centrally located blanket service contract, which has been established within the Deputy Commissioner budget center. This instrument enables MCB to encumber funds for authorized supported employment services with a wide variety of community-based vendors located in any of our six regional areas.

2. Describe the activities to be conducted, with funds reserved pursuant to section 603(d), for youth with the most significant disabilities, including:

A. the provision of extended services for a period not to exceed 4 years; and

As stated in the previous section:

One of MCB's major goals for FY 2023 is to continue to expand provision of supported employment services, particularly to students and youth with disabilities. This will be a formal, explicit FY 2023 objective for each VR manager overseeing the delivery of direct consumer services and will be incorporated into his or her individualized goals and objectives document for the year.

B. how the State will leverage other public and private funds to increase resources for extended services and expanded supported employment opportunities for youth with the most significant disabilities.

As stated in a previous section: The Massachusetts Department of Developmental Services (DDS) and the Massachusetts Department of Mental Health (DMH) have over the years worked cooperatively with MCB and provided extended services to a number of legally blind persons that have been provided supported employment services by MCB. A Memorandum of Agreement that includes provisions for use of joint agency resources to ensure quality service delivery and long term supports for supported employment was executed in November 2015. This includes a formal commitment of funding from MCB for appropriate supported employment services and a commitment from DDS for funding of the long-term, ongoing employment support services when needed. The agreement also provides for cross-training of staff.

.o. State's Strategies

Describe the required strategies and how the agency will use these strategies to achieve its goals and priorities, support innovation and expansion activities, and overcome any barriers to accessing the VR and the Supported Employment programs (See sections 101(a)(15)(D) and (18)(B) of the Rehabilitation Act and section 427 of the General Education Provisions Act (GEPA)):

1. The methods to be used to expand and improve services to individuals with disabilities.

Goal I: To have sufficient resources to serve all eligible individuals, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities include, but are not limited to:

- Monitor the agency budget and regularly advocate full funding of the VR program to ensure that in the years ahead the MCB can carry out its obligations to its many consumers. A measure for evaluation is the amount of state vocational rehabilitation funds appropriated by the Massachusetts Legislature.
- Monitor the allocation of funds for the Deaf-Blind Extended Supports Program and the Supported Employment Program. A measure for evaluation is the amount of state funds appropriated by the Massachusetts Legislature for the agency's state-funded Deaf-Blind Extended Supports Program. Some of these funds are used for on-going supported employment services after VR services are completed.

Measurement Methodology:

- The Rehabilitation Council's annual evaluation of the agency's progress toward the goal.
- The agency's success in maintaining or increasing its state budget.

Goal II: To develop more employment options for VR consumers, including supported employment, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities include, but are not limited to:

- Develop and implement plans to increase training opportunities for transition and pre-employment transition) consumers who are not going to college.
- Continue and expand the agency's internship program for legally blind students and youth who are attending college and high school graduates who are not going to college or who are "out of school" youth with the result that the number of students and youth participating increases each year. Coordinate the agency's internship program with other pre-employment transition services.
- Expand and develop a wide range of pre-employment transition services to enhance transition and employment opportunities for students who are legally blind and for

potentially eligible students with disabilities as mandated by the Workforce Innovation and Opportunity Act (WIOA).

- Devote re-allotment funds to the continuance of the “Employment Now Initiative” program that has demonstrated a high success rate for employment outcomes for its participants.
- Coordinate with the other components of the statewide workforce development system to better enable them to provide appropriate assistance to individuals who are legally blind by: recommending and helping to fund appropriate assistive technologies for MassHire Career Centers; offering to provide all MassHire Career Centers with guidance regarding their accessibility to visually-impaired consumers; providing on-site VR services to legally blind consumers who have scheduled appointments at MassHire Career Centers; providing training about blindness and visual impairment to the workforce development agencies; providing consultation to workforce development staff; working with workforce development agencies to develop apprenticeship and on-the-job training opportunities for legally blind consumers; identify job-driven training opportunities for legally blind consumers; and developing an improved referral process among the partner agencies.

Measurement Methodology:

- The Rehabilitation Council’s annual evaluation of the agency’s progress toward the goal.
- The number of consumers who complete the agency’s internship program.
- The number of students who participate in pre-employment transition services.

Goal III: Increase Outreach to Enroll Additional Eligible VR Consumers Statewide based upon estimates that a significant number of qualifying consumers are not presently enrolled.

Priorities, including, but not limited to:

Establish additional mediums for creating increased MCB exposure by:

- Explore the use of RSA Innovation & Expansion funding to increase outreach.
- Reevaluate the effectiveness of the present methodologies for conducting MCB consumer satisfaction surveys, and adjust, as appropriate.
- Explore the outcomes derived from the present Peer Mentoring program to determine the potential value for expanding the program.
- Recruit and train successful MCB VR alumni as ambassadors to conduct outreach to unenrolled consumers.

Measurement Methodology:

The Rehabilitation Council’s annual evaluation of the agency’s progress toward the goal.

- The number of applicants for services.

Goal IV: To help legally blind persons, including students and potentially eligible students, to develop and increase the independence needed to be successful in competitive employment, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities:

- Advocate and educate consumers and public officials on pedestrian safety issues which impact travel by pedestrians who use a white cane or service dog to seek and maintain employment.
- Advocate for better access to and improvement of public transportation and paratransit systems in order to increase the employment outcomes of persons who are legally blind.
- Increase focus on career readiness around remote and hybrid work settings. This involves being able to use teleconferencing, messaging, shared documents, and other related applications.
- Increase access to computers and basic keyboarding skills, in order to enable more MCB registered consumers to acquire elementary job readiness skills.
- Increase consumers' access to adaptive equipment as measured by the number served by the agency's Technology for the Blind Unit or referred to the Carroll Center's training program.
- Increase pre-employment transition, transition, and college students' access to educational materials, resources, and websites.
- Increase and adjust Assistive Technology training for working age MCB consumers to: Support those currently working to maintain or advance their employment opportunities.
- Improve job readiness technology skills for those MCB consumers hoping to enter or reenter the competitive workforce.
- Advocate for improved accessibility of federal and state government and private internet sites and documents.

Measurement Methodology:

- The Rehabilitation Council's annual evaluation of the agency's progress toward the goal.
- The number of consumers who are provided with assistive technology services.

Goal V: Increase the effectiveness and efficiency of vocational rehabilitation services delivery, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities include, but are not limited to:

- Annually review the agency performance on RSA standards and indicators and on other statistical measures of effectiveness and recommend actions to improve performance when appropriate.
- Improve communication and collaboration between VR counselors in MCB's regional offices and VR counselors in MCB's Deaf-Blind Extended Support Unit to enhance services to consumers.
- Improve communication and collaboration among MCB staff (VR counselors, children's service workers and social workers) in order to facilitate services to pre-employment transition consumers who have reached their fourteenth birthday and to identify on a case-by-case basis the most appropriate departments within MCB and programs offered by service providers to meet these individuals' needs.
- Improve communication and collaboration between MCB VR counselors and all other state, federal, contracted, and private agencies providing technology, vocational training, and employment services to MCB consumers, including eligible and potentially eligible pre-employment transition consumers.
- Provide appropriate after-school assistive technology and orientation and mobility services as pre-employment transition services to eligible and potentially eligible middle and high school students.
- Provide appropriate job exploration and counseling pre-employment transition services such as mentorships and exposure to real life career information.
- Provide appropriate work readiness pre-employment transition services in areas such as financial management, budgeting, and social skills.

Measurement Methodology:

The Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

- The number of consumers who are provided with pre-employment transition services.

2. How a broad range of assistive technology services and devices will be provided to individuals with disabilities at each stage of the rehabilitation process and on a statewide basis.

Relevant strategies listed in the previous section:

- Increase consumers' access to adaptive equipment as measured by the number served by the agency's Technology for the Blind Unit.
- Increase pre-employment transition, transition, and college students' access to educational materials, resources, and websites.
- Advocate for improved accessibility of federal and state government and private internet sites and documents.

- Improve communication and collaboration between MCB VR counselors and all other state, federal, contracted, and private agencies providing technology, vocational training, and employment services to MCB consumers, including eligible and potentially eligible pre-employment transition consumers.
- Provide appropriate after-school assistive technology and orientation and mobility services as pre-employment transition services to eligible and potentially eligible middle and high school students.

3. The outreach procedures that will be used to identify and serve individuals with disabilities who are minorities, including those with the most significant disabilities, as well as those who have been unserved or underserved by the VR program.

The agency has long placed a high priority on outreach to minority and underserved persons. The agency has for some years had a Diversity Committee within the agency. The committee consists of the Commissioner (or designee), the Director of Communications, vocational rehabilitation counselors, Human Resources Liaison, representatives of the agency Staff Development Unit, and support staff. The goal of the committee is to increase access to services for multi-cultural and minority consumers. The Diversity Committee has participated in the development of the curriculum for agency diversity training and has promoted staff attendance at community conferences which address issues relevant to provision of services to specific groups such as immigrants from Sub-Saharan Africa, the Middle East and Cambodia.

One strategy which the Diversity Committee uses is to invite the staffs of community groups with which the agency would like to develop closer relationships to attend events at MCB and share information and recommendations about outreach to minority group members who are legally blind.

Regional staff identify agencies and associations serving minority communities throughout the state and attend health fairs, church groups and other community events relevant to members of minority communities. MCB is listed in the Boston Community Health Education Center Resource Guide which leads to invitations to attend events to promote the agency's services among Boston's minority communities.

The agency's needs assessment studies and public hearings have for a number of years identified the lack of availability of ESL instruction for blind persons as a very serious problem since so many ESL programs use a picture-based methodology. A Massachusetts consumer group, the Association of Blind Citizens, has developed an audio (tape and CD) ESL course for blind and visually impaired persons. It has been shared with several ESL programs. MCB has continuously advocated for the availability of English as a Second Language instruction in accessible media. MCB advises ESL programs on resources for accessible instructional materials through organizations such as the American Printing House for the Blind. The agency believes that the increased partnership under WIOA with Adult Education and Literacy programs will facilitate cooperation to address this long-standing problem.

- The agency's Staff Development Unit has for a number of years worked to assist staff to better address the needs of traditionally underserved minority groups. A training

program on cultural diversity and rehabilitation issues is offered to vocational rehabilitation staff. In addition, the Director of Communications continues to arrange periodic luncheon seminars for staff on topics relevant to provision of services to minority populations.

4. The methods to be used to improve and expand VR services for students with disabilities, including the coordination of services designed to facilitate the transition of such students from school to postsecondary life (including the receipt of VR services, postsecondary education, employment, and pre-employment transition services).

Relevant strategies and methods:

- Develop and implement plans to increase training opportunities for transition and pre-employment transition consumers who are not going to college.
- Continue and expand the agency's internship program for legally blind students and youth who are attending college and high school graduates who are not going to college or out-of-school youth with the result that the number of students and youth who participate increases each year. Coordinate the agency's internship program with other pre-employment transition services.
- Expand and develop a wide range of pre-employment transition services to enhance transition and employment opportunities for students who are legally blind and for potentially eligible students with disabilities as mandated by the Workforce Innovation and Opportunity Act (WIOA).
- Increase pre-employment transition, transition, and college students' access to educational materials, resources, and websites.
- Improve communication and collaboration among MCB staff (VR counselors, children's service workers and social workers) in order to facilitate services to pre-employment transition consumers who have reached their fourteenth birthday and to identify on a case-by-case basis the most appropriate departments within MCB to meet these individuals' needs.
- Improve communication and collaboration between MCB VR counselors and all other state, federal, contracted, and private agencies providing technology, vocational training, and employment services to MCB consumers, including eligible and potentially eligible pre-employment transition consumers.
- Provide appropriate after-school assistive technology and orientation and mobility services as pre-employment transition services to eligible and potentially eligible middle and high school students.
- Provide appropriate job exploration and counseling pre-employment transition services such as mentorships and exposure to real life career information.
- Provide appropriate work readiness pre-employment transition services in areas such as financial management, budgeting, and social skills.

The RC supported MCB's statewide event held in June 2018 for providers of Pre-ETS Services to come together and learn about PRE-ETS requirements.

On March 24, 2023, the Massachusetts Commission for the Blind (MCB) held its MCB Visions of Collaboration Conference for Teachers of the Visually Impaired, MCB VR counselors and supervisors, and other special education staff. One hundred and fifty professionals attended. The focus of the conference was on Program innovation and future ideas and transition. The agenda included presentations on the importance of orientation and mobility in the transition process, APH expanded core curriculum, tools for transition planning, 5th year of high school, a less conventional path to college success, IEP improvement project, Compass: a new take on college readiness planning and services offered by MCB; and preparing for college. Employers, special education staff, students, and MCB staff were among the presenters. The participant evaluations continue to be very positive for this event.

5. If applicable, plans for establishing, developing, or improving community rehabilitation programs within the State.

Not applicable.

6. Strategies to improve the performance of the State with respect to the performance accountability measures under section 116 of WIOA.

Annually review the agency performance on RSA standards and indicators, performance accountability measures under section 116 of WIOA, and on other statistical measures of effectiveness and recommend actions to improve performance when appropriate.

7. Strategies for assisting other components of the statewide workforce development system in assisting individuals with disabilities.

Relevant strategies:

Assist the other components of the statewide workforce development system in assisting individuals who are legally blind by: offering to provide all MassHire Career Centers with an evaluation of their accessibility to visually-impaired consumers; providing on-site VR services to legally blind consumers who have scheduled appointments at MassHire Career Centers; providing training about blindness and visual impairment to the workforce development agencies; providing consultation to workforce development staff; working with workforce development agencies to develop apprenticeship and on-the-job training opportunities for legally blind consumers; identify job-driven training opportunities for legally blind consumers; and developing an improved referral process among the partner agencies.

In 2017, MCB along with other WIOA partners entered into an MOU with MassHire Career Centers. Under the MOU, access to MCB programs, services, and resources will be made available at all MassHire Career Centers. Local areas will determine how MCB programs and services are accessed through the MassHire Career Centers based on the volume of customers

and the availability of MCB staff. Legally Blind and visually impaired consumers will receive access to MCB services at the MassHire Career Centers in one or more of the following ways:

- MassHire Career Center staff will be appropriately trained to provide information to legally blind and visually impaired consumers about programs, services, and activities available through MCB.
- MassHire Career Center staff will make a direct link between the legally blind and visually impaired consumer and MCB staff to schedule an appointment, or to receive useful information about programs and services.
- Based on need, MCB staff will be physically present at the MassHire Career Center to provide services.
- MCB will support an integrated service delivery strategy in which MassHire Career Center staff will provide Career Center services to legally blind and visually impaired customers by:
 - Assisting the Local Boards with training MassHire Career Center staff to use assistive technology with visually impaired or legally blind consumers who seek career center services.
 - Providing training to MassHire Center staff on accessibility requirements for legally blind and visually impaired consumers.
 - Assisting with accommodations related to workshops for legally blind and visually impaired consumers.
 - Providing training to MassHire Career Center staff so that staff have basic knowledge of programs, services, and resources available through MCB.
 - Ensuring that MCB Employment Services Representatives and MassHire Centers Business Service Representatives collaborate so that legally blind and visually impaired consumers receive appropriate job matching by reviewing consumers skills, communicating employer qualifications and organization culture, and sharing employer contacts.
- Providing sensitivity training to MassHire Centers staff.

MCB believes that these strategies will significantly improve consumer access and utilization of career center services.

Since apprenticeships have seldom been available to legally blind consumers, MCB continues to research information available through the Massachusetts Division of Apprenticeship Standards, the U.S. Department of Labor's Office of Disability Employment Policy, and other vocational rehabilitation agencies to learn more about apprenticeships for legally blind persons and how to access opportunities through the Massachusetts Apprenticeship Initiative (MAI) or other resources in Massachusetts and New England.

8. How the agency's strategies will be used to:

A. achieve goals and priorities by the State, consistent with the comprehensive needs assessment;

The Rehabilitation Council (MCB RC) has continued to review the consumer satisfaction studies conducted and the comprehensive needs assessment on a routine basis and the members and the agency have used them in developing the goals and priorities.

B. support innovation and expansion activities; and

C. overcome identified barriers relating to equitable access to and participation of individuals with disabilities in the State VR Services Program and the State Supported Employment Services Program.

The agency has long placed a high priority on outreach to minority and underserved persons. The agency has for some years had a Diversity Committee within the agency. The committee consists of the Commissioner, the Director of Communications, vocational rehabilitation counselors, representatives of the agency Staff Development Unit, and support staff. The goal of the committee is to increase access to services for multi-cultural and minority consumers. The Diversity Committee has participated in the development of the curriculum for agency diversity training and has promoted staff attendance at community conferences which address issues relevant to provision of services to specific groups such as immigrants from Sub-Saharan Africa and Cambodia. One strategy which the Diversity Committee uses is to invite the staffs of community groups with which the agency would like to develop closer relationships to attend luncheons at MCB and share information and recommendations about outreach to minority group members who are legally blind.

The agency has access to the Language Line interpreter service in all its offices to assist counselors in working with consumers who speak all languages, especially uncommon ones. Language Line offers interpretation of more than 140 languages. For home visits, MCB contracts with Catholic Charities for language interpreters in the community who can interpret languages such as Khmer, Chinese, French, Russian, Polish, Croatian, Vietnamese, and Spanish.

In 2017, MCB developed an electronic brochure of services. The list of services organized by topic was recorded and has been made available on a thumb drive as well as on a cartridge. In addition, the information is being recorded and will be made available on YouTube through a link on the MCB website. The goal is for prospective consumers to receive information on MCB services before they leave an eye professional's office after a diagnosis of legal blindness or visual impairment. MCB will distribute the thumb drives and cartridges statewide with special emphasis on targeted underserved regions of the state as well as on collaboration with minority organizations to distribute them to their members. By using different avenues to get the information out, MCB anticipates attracting prospective consumers and getting them engaged in VR services and closing the information access gap. MCB has also developed a Request for

Response (RFR) for a project of outreach to both consumers and employers. The RFR seeks a consultant with integrated marketing skills expertise to recommend and implement an ad campaign across various media to target employers, MCB consumers, and eye professionals. The multi-faceted goals of this are to reach employers who we can potentially partner with in the future to increase successful and rewarding employment for consumers. Additionally, we want to elevate awareness in the low vision and blind community of the services that we provide for our consumers and to encourage the legally blind to engage with MCB so that we can better assist them.

In 2022 MCB conducted the What's Your Vision Campaign. The ["What's Your Vision?"](https://www.mass.gov/whats-your-vision) [mass.gov/whats-your-vision](https://www.mass.gov/whats-your-vision) public awareness campaign emphasizes the importance of ensuring Massachusetts residents who are blind and visually impaired have the opportunity to put their skills and talents to work for the Commonwealth's employers and economy, and the Massachusetts Commission for the Blind's (MCB) role in delivering on this goal.

The paid digital and traditional advertisements featured successful members of MCB's vocational rehabilitation (VR) community who served to motivate their peers to conceive employment as an achievable goal.

The campaign built awareness of MCB and its VR program and services, and increased engagement with legally blind consumers and their families, as well as outreach to eye care providers and employers in Massachusetts, who all play a vital role in creating successful employment outcomes for people who are blind and visually impaired.

While the campaign's a primary focus was to bring new consumers into MCB's VR program, additional goals included:

- Give employers and other community stakeholders information on blindness as a resource for their employees; and
- Equip eye care providers with information and resources about VR services to be shared upon a legally blind or visual impairment diagnosis.

p. Evaluation and Reports of Progress: VR and Supported Employment Goals

Describe:

1. An evaluation of the extent to which the VR program goals described in the approved VR services portion of the *Unified or Combined State Plan* for the most recently completed program year were achieved. The evaluation must:

A. Identify the strategies that contributed to the achievement of the goals.

The following is an evaluation of the extent to which the MCB VR program goals described in the previously approved VR services portion of the *Combined State Plan* for the most recently completed program year, 2019, were achieved.

The Massachusetts Commission for the Blind worked with the Rehabilitation Council on the mutually agreed upon goals and the use of Title I funds for innovation and expansion activities. The narrative interwoven with the goals below provides a report of progress in achieving the VR program goals; it describes factors that impeded the achievement of the goals and priorities, to the extent they were not achieved, and provides a report on how the funds reserved for innovation and expansion activities were utilized in the preceding year. One baseline for evaluation is a survey of MCB RC members' annual evaluation of progress towards the goals.

Goal I: To have sufficient resources to serve all eligible individuals, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities

- Monitor annually the budget and regularly advocate full funding of the VR program to ensure that in the years ahead the MCB can carry out its obligations to its many consumers. A measure for evaluation is the amount of state vocational rehabilitation funds appropriated by the Massachusetts Legislature.
- Monitor annually the allocation of funds for the Deaf-Blind Extended Supports Program and the Supported Employment Program. A measure for evaluation is the amount of state funds appropriated by the Massachusetts Legislature for the agency state-funded Deaf-Blind Extended Supports Program. Some of these funds are used for on-going supported employment services after VR services are completed.

Report of Progress: The agency has had sufficient resources to serve all eligible individuals through PY 2023. The Massachusetts Legislature has continued to fund the agency's VR program sufficient to match federal funds. The Rehabilitation Council expresses interest in advocating for increased vocational rehabilitation funding at the state level.

MCB RC Evaluation: In FY 2018, members rated the agency's progress as Very Good (4 out of 5).

Goal II: To develop more employment options for VR consumers, including supported employment, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities

- Develop and implement plans to increase training opportunities for transition-age consumers who are not going to college.
- Continue and refine the agency's internship program for legally blind students who are attending college; explore ways to expand the program to include recent high school graduates who are not going to college with the result that the number of students participating increases each year.

Report of Progress: The development of increased training opportunities for transition-age consumers who are not going to college continues to be a major focus area.

In 2015, MCB partnered with Massachusetts Eye and Ear and Cambridge Health Alliance to become the first agency for the blind to launch Project SEARCH, a successful national 9-month program for individuals with disabilities that provides internship experiences. Between 2015 and 2019 there have been 30 participants with 21 of them achieving employment, resulting in an 70% employment outcome rate. In 2019, drawing on this successful experience, the agency developed the Employment Now initiative which is similar to Project SEARCH but is locally managed by the agency and two non-profit providers. The Employment Now initiative is a model that moves vocational rehabilitation consumers on a fast track to employment. The goal is to combine internships or work experiences with the support of an onsite job coach while conducting an active job search. Job development for the specific consumer takes place during internships or work experiences so that transition from the internship to a paying job will occur without long gaps of unemployment. Of the eight consumers who have participated during 2019, six have achieved full-time employment. Massachusetts Eye and Ear and Cambridge Health Alliance have remained as partners. MCB is also seeking to recruit partners in other industries since hospitals tend to have large, proprietary information systems that can be difficult to make accessible to all legally blind consumers.

The Deaf-Blind Extended Supports Unit has one counselor who provides specialized, intensive VR services to a group of multi-disabled consumers who are thought to be currently underserved; these are consumers who are not deaf or intellectually disabled but have very significant disabilities such as mental illness or brain injury in addition to blindness.

During the past five years, MCB has participated in several hiring events with the Massachusetts Rehabilitation Commission that were sponsored by the Office of Federal Contract Compliance Programs (OFCCP). Federal contractors are required to set a hiring goal of having 7% of their employees drawn from qualified workers with disabilities. MCB continues, in conjunction with the Massachusetts Rehabilitation Commission, to maintain dialogue with OFCCP and has participated in several of its in-service training programs.

In 2017, with a technical assistance grant from RSA, the Job Driven Vocational Rehabilitation Technical assistance (JDVRTAC), MCB operationalized VisionWorks Consortium which consists of MCB, the Carroll Center for the Blind, and the Perkins School for the Blind. The three organizations that are a part of the consortium pooled their employer contacts into a centralized database to track the business partner engagement to increase employment opportunities for job seekers who are visually impaired.

For the past several years, agency staff has regularly conducted a four-hour course of soft skills training for prospective student interns and job-ready consumers. Soft skills are those interpersonal skills such as cooperativeness, politeness, and friendliness that enhance an individual's on-the-job interactions, job performance and career prospects. The training takes place in regional offices, making attendance more convenient for consumers. The subjects covered are: resumes and cover letters, interviewing, workplace behaviors, personal grooming,

networking, and disclosure of one's disability. In addition, for those job-ready consumers who do not need soft skills training, different courses are held for them such as networking and how to get onto LinkedIn. MCB intends to enhance and expand this training by developing a series of intensive soft skills "boot camp" training video sessions. MCB will develop copies in different formats that can be used for webinar series and other social media platforms.

Recognizing that many employers are now using telephone interviews to screen applicants, the agency for several years has contracted with Phone Interview Pro, a company that provides consumers with a thirty-minute interview that simulates an actual interview with an experienced corporate evaluator. The consumer and the counselor are then provided with a detailed, personalized report of the interview that identifies strengths and areas that need improvement. A second interview is then arranged to give the consumer the opportunity to practice what he or she has learned from the first interview. MCB counselors have referred approximately 35 consumers to undergo this evaluation during FY 2014. The majority of the consumers find the experience to be very beneficial.

o MCB also provides a one-day Essential Skills Training for transition-age youth. This training covers soft skills and other career development skills for younger consumers. Based on feedback from consumers and counselors, this training has been expanded to offer consumers more opportunities to interact with employers and to include other pre-employment transition components such as occupational information and career exploration.

MCB Summer Internship Program

This was the 20th anniversary of the Summer Internship Program, which launched in 2003 with only two interns. This year, 60 consumers participated, joining a group of approximately 800 interns who have graduated since the start. At the closing ceremony held at the State House in August, Draper received the Employer Partnership Award for its commitment to diversifying its workforce by providing internship and employment opportunities to residents of the Commonwealth who are legally blind. Some current interns, some past interns who are now employed, and some employers that hosted interns participated in the opening and closing ceremonies as panelists and speakers. In addition, the interns had the opportunity to submit an entry for the Reach for the Stars contest, which this year instructed them to write a cover letter for a job they were interested in. Awards were presented to the top three winners. Planning is already underway for the 2024 internship program.

MCB RC Evaluation: In FY 2018, members rated the agency's progress as Good/Very Good (3.6 out of 5).

Goal III: To help legally blind persons to increase their independence, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities:

- Advocate and educate consumers and public officials on pedestrian safety issues which impact pedestrians who are legally blind and issues regarding laws pertaining to the white cane and the use of service dogs;

- Advocate for better access to, and improvement of, public transportation and paratransit systems throughout the Commonwealth.
- Increase consumers' access to adaptive equipment as measured by the number served each year by the agency's Technology for the Blind Unit.
- Increase students' access to accessible textbooks.
- Advocate for improved accessibility of federal and state government documents and internet sites.

Report of Progress:

In recent years, MCB has collaborated with the Registry of Motor Vehicles (RMV) around White Cane Safety Law, and as a result, the RMV included white cane and use of service dog flyers in two separate mailings. They also ran public service announcements (PSAs) on electronic billboards on four major highways across the state. Building on the momentum, MCB worked with a local Cable Access network to produce a television PSA that promotes white cane safety and the Massachusetts White Cane Law.

- The agency has been able to increase consumers' access to both adaptive equipment and accessible textbooks during PY 2018 and PY 2019. The agency's Technology for the Blind Unit will serve approximately 1,200 VR consumers during FFY 2020. The staff of the unit includes a technology specialist who is able to provide extended training in Word, Outlook, and basic navigation and eight rehabilitation engineers.
- The agency continues to enhance the independence and educational and vocational potential of blind children by providing adaptive equipment and software on a limited basis to elementary and middle-school aged children under its state-funded social services program. These services enable these young consumers to transition to pre-transition employment and vocational rehabilitation services at age 14 with the same level of technical skill as their sighted peers. In addition, MCB has revised its policies under the vocational rehabilitation program (in line with RSA regulations and guidance) to provide more adaptive equipment and training to pre-employment transition consumers to allow them to access and improve their work readiness, vocational, and independent living skills when they are not in school.
- MCB has been working with providers to develop new options for pre-employment transition services. The Carroll Center for the Blind, Polus Center, Lowell Association for the Blind, Perkins, and Our Space, Our Place have developed work readiness programs to address several needs. Example: Pre-ETS participants had a chance to participate in a hands-on culinary arts program where they explored careers in the culinary field.

MCB RC Evaluation: In FY 2018, members rated the agency's progress as Very Good (4.4 out of 5).

Goal IV: Increase the effectiveness and efficiency of vocational rehabilitation services delivery, as measured by the Rehabilitation Council's annual evaluation of the agency's progress toward the goal.

Priorities:

- Review annually the agency performance on RSA standards and indicators, WIOA performance measurements, and on other statistical measures of effectiveness and to recommend actions to improve performance when appropriate.
- Improve communication among all MCB VR staff between VR counselors in MCB regional offices and VR counselors in the MCB Deaf-Blind Extended Supports Unit to enhance services to consumers who would otherwise not receive necessary services.
- Improve communication among MCB staff (VR counselors, children's service workers and social workers) in order to facilitate services to consumers who have reached their fourteenth birthday and to identify on a case-by-case basis the most appropriate department within MCB to meet these individuals' needs.
- Improve and maintain ongoing communication between MCB VR counselors and all other state, federal, contracted, and private agencies providing technology, vocational training, and employment services to MCB consumers, including those individuals with other disabilities in addition to blindness.

Report of Progress

- In 2017, MCB migrated to a new case management system, AWARE which is currently used by over 38 VR state agencies and 24 tribal nations. This system has the capacity to generate statistical reports to help counselors, management, and Rehabilitation Council members to evaluate the agency's effectiveness. MCB continues to work with the vendor to develop improved specific statistical reports for both the MCB management and the Rehabilitation Council, including those required for the new WIOA performance measurements and the new RSA-911 reporting requirements for PY 2020.
- The MCB RC members currently annually review the agency's performance on statistical measures of effectiveness as well as the agency's consumer satisfaction studies. The agency's performance on RSA standards and indicators has at all times met the minimum level of overall performance established by RSA.
- MCB has addressed the priority to facilitate services to consumers who have reached their fourteenth birthday and to identify on a case-by-case basis the most appropriate unit within MCB by developing a comprehensive assessment form for children's workers to complete. In addition, MCB and DESE have jointly developed a technical advisory to educate TVIs, O&M instructors and other special education representatives on eligibility requirements for Pre-ETS including for those who are potentially eligible, making these services accessible to all youth with disabilities.
- The agency holds several College Nights each year throughout the state for students who are considering attending college. Their families are also invited. The purpose is to

orient the students to MCB services, college disability services, etc. and to answer their questions. MCB also holds a half-day orientation session each spring in Greater Boston for those consumers who intend to begin college in the fall.

- MCB has developed a transition form to improve services to adolescents and their transition to adult services and to improve communication among the involved staff when the child turns 14. MCB Children's Workers and the Vocational Rehabilitation Counselors often make joint visits to the adolescent and parents to help the family to develop a roadmap for the child's services going forward. Consultations with agency rehabilitation teachers, mobility specialists, and technology specialists are also offered to the consumer and family.
- MCB has committed in the statewide Memorandum of Understanding to participate in teams to be established comprised of individuals who are empowered to represent the core partner agency for the purpose of developing and executing local MOUs, modeled on the state MOU.

MCB RC Evaluation: In FY 2018, members rated the agency's progress as Good/Very Good (3.8 out of 5).

MCB has reviewed its performance on the national Standards and Indicators each year since the implementation of these standards and indicators many years ago. Analysis of the indicators has identified areas for improvement in the agency's performance. The agency is pleased to note that its rehabilitants earn one of the highest average wage levels of all the state vocational rehabilitation programs. The agency has attained one of the highest average wage levels since those standards and indicators were implemented some years ago.

B. Describe the factors that impeded the achievement of the goals and priorities.

Long-standing problems and factors that impede the achievement of the goals and priorities include:

- public transportation systems and pedestrian safety issues which limit access to employment and some vocational rehabilitation services
- students' access to accessible textbooks
- accessibility of documents and internet sites needed to obtain and retain employment
- employer attitudes toward blindness
- inaccessible information systems used by many large employers

Report of Progress:

- In 2016, the Massachusetts Bay Transportation Authority's piloted a program between the Ride (the Ride service provides paratransit, or supplemental transportation, to disabled customers), Uber and Lyft. Those eligible for the Ride became eligible to take part in the program where they could use a ride-hailing service any time at a lower cost. In 2017, a review showed that more than 10,000 rides covering 45,000 miles in 133 zip codes had been provided. In addition, the partnership had resulted in a 20% cost

reduction for the transportation agency. The service, concentrated in the eastern part of the state, is benefiting many of MCB consumers.

- In 2017, a statewide mobility management initiative was started between EOHHS and MassDOT to develop an on-line One-Stop searchable directory of public, private and accessible transportation options in the state. This initiative should be of particular interest for consumers in the rural parts of the state that still experience a lack of reliable transportation. The MCB RC continues to support MCB's efforts on this issue.
- In 2015, The Braille Literacy Advisory Council (BrLAC) was charged with developing a plan for implementing Unified English Braille (UEB) in Massachusetts to present to the Department of Elementary and Secondary Education (DESE). In 2017, The Braille Literacy Advisory Council proposed a plan for transitioning to a full implementation of UEB to ensure a free appropriate public education (FAPE) for students with vision impairments in Massachusetts. Some of the items on the implementation plan include:
 - Teachers of Students with Visual Impairments (TVIs) to receive professional development training in UEB.
 - TVIs began to expose and instruct braille learners in non-technical UEB on an individual basis.
 - Instructional Materials available in UEB, EBAE, UEB with Nemeth and/or EBAE/Nemeth.
 - AIM Library accepted requests for instructional materials in the above-mentioned formats.
 - School districts prepared to support requests for instructional materials in the above-mentioned formats.
 - Statewide Assessments will be provided in EBAE/Nemeth for all statewide assessments
 - Teachers-in-Training at UMass Vision Studies received braille instruction in UEB (technical and non-technical) and Nemeth.
 - The implementation was planned for school year 2016 through 2020. More information can be found at: doe.mass.edu/news/news.aspx?id=23936

In addition, over the past year, the BrLAC focus has been on encouraging the College Board to provide SAT and other tests in the Braille format, which is most appropriate for each student, sometimes Unified English Braille and sometimes the traditional English Braille System. Commissioner D'Arcangelo signed off on a letter to the College Board, requesting that it accommodate each student's individual needs. The BrLAC also has also been working on Braille Certification/testing of TVIs.

2. An evaluation of the extent to which the Supported Employment program goals described in the Supported Employment Supplement for the most recent program year were achieved. The evaluation must:

A. Identify the strategies that contributed to the achievement of the goals.

Monitor annually the allocation of funds for the Deaf-Blind Extended Supports Program and the Supported Employment Program. A measure for evaluation is the amount of state funds appropriated by the Massachusetts Legislature for the agency's state-funded Deaf-Blind Extended Supports Program. Some of these funds are used for on-going supported employment services after VR services are completed.

Report of Progress:

The agency has had sufficient resources to serve all eligible individuals through 2023. The Massachusetts Legislature has continued to fund the agency's VR program sufficient to match federal funds. The Rehabilitation Council has been very active in advocating for increased vocational rehabilitation funding at the state level. The SFY 2023 state appropriation for the state-funded Deaf-Blind Extended Supports Program is enough to cover the need for more residential and supported services for those consumers who are turning age 22. This program provides residential and day services, including on-going supported employment services to individuals with the most significant disabilities.

In addition, as also stated in previous sections: The Massachusetts Department of Developmental Services (DDS) and the Massachusetts Department of Mental Health (DMH) have over the years worked cooperatively with MCB and provided extended services to a number of legally blind persons that have been provided supported employment services by MCB. MCB continues to collaborate with the DDS on plans to expand services to mutual consumers that includes an initiative to better identify consumers who could benefit from supported employment services and are not receiving them at this time. A new Memorandum of Agreement that includes provisions for use of joint agency resources to ensure quality service delivery and long term supports for supported employment was executed in November 2015. This includes a formal commitment of funding from MCB for appropriate supported employment services and a commitment from DDS for funding of the long-term, ongoing employment support services when needed. The agreement also provides for cross-training of staff.

In accordance with the requirements of the Rehabilitation Act, MCB executed a WIOA Cooperative Agreement with MassHealth in January 2016. In addition, discussions with the Massachusetts Rehabilitation Commission (MRC) have clarified that MCB consumers who have been rehabilitated into competitive integrated supported employment will be eligible to receive funding for on-going supports under its state-funded Extended Ongoing Supports Program. MCB is very appreciative of the help and advice that the MRC Extended Ongoing Supports Program provided and expects that the availability of this resource will increase the opportunities for supported employment for legally blind consumers who have significant secondary disabilities but do not qualify for on-going supports from another state or private agency.

Over the years, the Massachusetts Department of Mental Health (DMH) has worked cooperatively with MCB by providing extended services and other services to some legally blind persons that have received supported employment services and other services from MCB.

To address the problem of lack of adequate supported competitive integrated employment opportunities, MCB intends to hire a consultant to evaluate the viability of establishing a for-profit business enterprise that employs individuals who are blind and visually impaired in a competitive integrated supported employment environment. It is understood that such a business must be comprised of blind, visually-impaired, and people both with and without disabilities so that the workforce and environment is fully integrated. The business is expected to generate positive, measurable social impact alongside a financial return. Business models that can be studied can involve potential ownership by employees and profit-sharing plans. Examples of potential business models for consideration include: Medical Billing/Coding, Information Technology Support, Contract Support, Sourcing, Cyber-Security, and 508 Assurance, etc.

B. Describe the factors that impeded the achievement of the goals and priorities.

Long-standing problems and factors that impede the achievement of the supported employment goals and priorities include:

- public transportation systems and pedestrian safety issues which limit access to employment and some vocational rehabilitation services
- lack of funding for extended supports for consumers who are not eligible for funding from the Department of Developmental Services or the Department of Mental Health

3. The VR program's performance on the performance accountability indicators under section 116 of WIOA.

The RC is aware of and has discussed the new WIOA common performance accountability measures under Section 116 of WIOA and looks forward to using them more in its considerations of the effectiveness of the VR program. MCB will continue to report baseline data to RSA on these measures as specified in the final requirements for the *WIOA Combined/Unified State Plan*. MCB will analyze the data and create a report for management and the RC on the common measures. MCB continues to track progress on many of the prior Standards and Indicators.

4. How the funds reserved for innovation and expansion (I&E) activities were utilized.

During FFY 2023, the Massachusetts Commission for the Blind worked with the Rehabilitation Council on the mutually agreed upon goals and the use of Title I funds for innovation and expansion activities.

Specific innovation and expansion (I&E) activities and initiatives include:

- In 2015, MCB partnered with Massachusetts Eye and Ear and Cambridge Health Alliance to become the first agency for the blind to launch Project SEARCH, a successful national 9-month program for individuals with disabilities that provides internship experiences. This program resulted in a 70% employment outcome rate. In 2019, drawing on this successful experience, the agency developed the Employment Now initiative which is similar to Project SEARCH but is locally managed by the agency and two non-profit providers. The Employment Now initiative is a model that moves vocational rehabilitation consumers on a fast track to employment. The goal is to combine internships or work experiences with the support of an onsite job coach while conducting an active job search. Job development for the specific consumer takes place during internships or work experiences so that transition from the internship to a paying job will occur without long gaps of unemployment. Of the eight consumers who have participated during 2019, six have achieved full-time employment. Massachusetts Eye and Ear and Cambridge Health Alliance have remained as partners. MCB is also seeking to recruit partners in other industries since hospitals tend to have large, proprietary information systems that can be difficult to make accessible to all legally blind consumers.

MCB Summer Internship Program

This was the 20th anniversary of the Summer Internship Program, which launched in 2003 with only two interns. This year, 60 consumers participated, joining a group of approximately 800 interns who have graduated since the start. At the closing ceremony held at the State House in August, Draper received the Employer Partnership Award for its commitment to diversifying its workforce by providing internship and employment opportunities to residents of the Commonwealth who are legally blind. Some current interns, some past interns who are now employed, and some employers that hosted interns participated in the opening and closing ceremonies as panelists and speakers. In addition, the interns had the opportunity to submit an entry for the Reach for the Stars contest, which this year instructed them to write a cover letter for a job they were interested in. Awards were presented to the top three winners. Planning is already underway for the 2024 internship program.

- The agency has been able to increase consumers' access to both adaptive equipment and accessible textbooks during FY 2023. The agency's Technology for the Blind Unit will serve approximately 1,500 VR consumers during FFY 2023. The staff of the unit includes a technology specialist who can provide extended training in Word, Outlook, and basic navigation and eight rehabilitation engineers.
- The agency has been able to continue to enhance the independence and educational and vocational potential of blind children by providing adaptive equipment and software on a limited basis to elementary- and middle-school aged children under its state-funded social services program. These services enable these young consumers to transition to pre-transition employment and vocational rehabilitation services at age 14 with the same level of technical skill as their sighted peers. In addition, MCB has revised its policies under

the vocational rehabilitation program (in line with RSA regulations and guidance) to provide more adaptive equipment and training to pre-employment transition consumers to allow them to access and improve their work readiness, vocational, and independent living skills when they are not in school.

- MCB continues to work with providers to develop new options for pre-employment transition services. For example, the Carroll Center for the Blind has developed a SAT/ACT and College Application Pre-requisites & Process program to address the need for counseling on opportunities for enrollment in postsecondary educational programs.

.q. Quality, Scope, and Extent of Supported Employment Services.

Include the following:

1. The quality, scope, and extent of supported employment services to be provided to individuals with the most significant disabilities, including youth with the most significant disabilities.

The purpose of the Massachusetts Commission for the Blind's Supported Employment Program is to create and provide paid employment opportunities for legally blind persons with significant secondary disabilities within integrated work settings. Services include: an individual evaluation of rehabilitation potential via supported employment, provision of job development services (including job analysis and appropriate engineering accommodation); intensive on-the-job training and job coaching, and provision or coordination of support services such as counseling or transportation. Services are provided within federal guidelines until the employment is secure and appropriate extended (non-VR) services are in place.

The Massachusetts Commission for the Blind remains committed to increasing the quality, scope, and extent of Supported Employment Services to eligible consumers. There are a sufficient number of service providers who deliver supported employment in the state on a fee for service basis. The Commission for the Blind is fortunate that the Massachusetts Department of Developmental Services provides on-going extended services to many consumers who are both intellectually disabled and legally blind. The agency is also fortunate to have some state funding available to provide extended services to consumers who are both deaf and legally blind.

During 2015, the agency started to collaborate with the DDS on plans to expand services to consumers including an initiative to better identify mutual consumers who could benefit from supported employment services and are not receiving them. In late 2015, MCB and DDS executed a new Memorandum of Agreement that includes provisions for use of joint agency resources to ensure quality service delivery and long term supports for supported employment. All work programs will be in integrated settings paying the minimum wage. The agreement includes a formal commitment of funding from MCB for appropriate supported employment services and a commitment from DDS for funding of the long-term, ongoing employment

support services when needed. The agreement also provides for cross-training of staff. MCB continues to work with DDS under the MOU in 2023.

In January 2016, MCB executed a *WIOA Cooperative Agreement* with MassHealth in accordance with the requirements of the Rehabilitation Act.

In addition, in 2015, discussions with the Massachusetts Rehabilitation Commission (MRC) clarified that MCB consumers who have been rehabilitated into competitive integrated supported employment will be eligible to receive funding for on-going supports under its state-funded Extended Ongoing Supports Program. MCB is very appreciative of the help and advice that the MRC Extended Ongoing Supports Program has provided and expects that the availability of this resource will increase the opportunities for supported employment for legally blind consumers who have significant secondary disabilities but do not qualify for on-going supports from another state or private agency.

MCB looks forward to being allowed under the forthcoming WIOA regulations to extend the time that consumers may receive needed supported employment services before transition to extended services. There are some consumers who may need extra time, particularly pre-employment transition consumers.

2. The timing of transition to extended services.

Once the individual has maintained stability on the job for an appropriate period of time, the funding for and provision of extended services transitions to an extended services provider. The rehabilitation counselor continues to track the individual's progress and job stability during the transition period. If the individual maintains stabilization for 90 days or more after transition to extended services, the case is closed successfully. If needed, post-employment services may be provided at any time after closure.

Certifications

Name of designated State agency or designated State unit, as appropriate: Massachusetts Commission for the Blind

Name of designated State agency: Massachusetts Commission for the Blind

Full Name of Authorized Representative: John Oliveira

Title of Authorized Representative: Commissioner, Massachusetts Commission for the Blind

States must provide written and signed certifications that:

1. The designated State agency or designated State unit (as appropriate) listed above is authorized to submit the VR services portion of the *Unified or Combined State Plan* under title I

of the Rehabilitation Act of 1973 (Rehabilitation Act), as amended by WIOA*, and its supplement under title VI of the Rehabilitation Act;** **Yes**

2. As a condition for the receipt of Federal funds under title I of the Rehabilitation Act for the provision of VR services, the designated State agency listed above agrees to operate and administer the State VR Services Program in accordance with the VR services portion of the *Unified or Combined State Plan*, the Rehabilitation Act, and all applicable regulations, policies, and procedures established by the Secretary of Education. Funds made available under *section 111* of the Rehabilitation Act are used solely for the provision of VR services and the administration of the VR services portion of the *Unified or Combined State Plan*; **Yes**

3. As a condition for the receipt of Federal funds under title VI of the Rehabilitation Act for supported employment services, the designated State agency agrees to operate and administer the State Supported Employment Services Program in accordance with the supplement to the VR services portion of the *Unified or Combined State Plan**, the Rehabilitation Act, and all applicable regulations, policies, and procedures established by the Secretary of Education. Funds made available under title VI are used solely for the provision of supported employment services and the administration of the supplement to the VR services portion of the *Unified or Combined State Plan*;** **Yes**

4. The designated State agency and/or the designated State unit has the authority under State law to perform the functions of the State regarding the VR services portion of the *Unified or Combined State Plan* and its supplement; **Yes**

5. The State legally may carry out each provision of the VR services portion of the *Unified or Combined State Plan* and its supplement; **Yes**

6. All provisions of the VR services portion of the *Unified or Combined State Plan* and its supplement are consistent with State law; **Yes**

7. The Authorized Representative listed above has the authority under State law to receive, hold, and disburse Federal funds made available under the VR services portion of the *Unified or Combined State Plan* and its supplement; **Yes**

8. The Authorized Representative listed above has the authority to submit the VR services portion of the *Unified or Combined State Plan* and the supplement for Supported Employment services; **Yes**

9. The agency that submits the VR services portion of the *Unified or Combined State Plan* and its supplement has adopted or otherwise formally approved the plan and its supplement. **Yes**

Footnotes

Certification 1 Footnotes

* Public Law 113-128.

** Unless otherwise stated, “Rehabilitation Act” means the Rehabilitation Act of 1973, as amended by WIOA, signed into law on July 22, 2014.

Certification 2 Footnotes

* All references in this plan to “designated State agency” or to “the State agency” relate to the agency identified in this paragraph.

** No funds under title 1 of the Rehabilitation Act may be awarded without an approved VR services portion of the Unified or Combined State Plan in accordance with section 101(a) of the Rehabilitation Act.

*** Applicable regulations, in part, include the Education Department General Administrative Regulations (EDGAR) in 34 CFR parts 76, 77, 79, 81, and 82; 2 CFR part 200 as adopted by 2 CFR part 3485; and the State VR Services Program regulations.

Certification 3 Footnotes

* No funds under title VI of the Rehabilitation Act may be awarded without an approved supplement to the VR services portion of the Unified or Combined State Plan in accordance with section 606(a) of the Rehabilitation Act.

** Applicable regulations, in part, include the citations in *** under Certification 2 footnotes

Additional Comments on the Certifications from the State

Certification Regarding Lobbying - Vocational Rehabilitation

Certification for Contracts, Grants, Loans, and Cooperative Agreements The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the

undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Applicant's Organization: Massachusetts Commission for the Blind

Full Name of Authorized Representative: John Oliveira

Title of Authorized Representative: Commissioner

SF LLL Form – Disclosure of Lobbying Activities (only if applicable)

(<http://www2.ed.gov/fund/grant/apply/appforms/appforms.html>). If applicable, please print, sign, and email to mailto:MAT_OCTAE@ed.gov

Certification Regarding Lobbying — Supported Employment

Certification for Contracts, Grants, Loans, and Co-operative Agreements The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative

agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or co-operative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit *Standard Form-LLL, "Disclosure of Lobbying Activities,"* in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Applicant's Organization: Massachusetts Commission for the Blind

Full Name of Authorized Representative: John Oliveira

Title of Authorized Representative: Commissioner

SF LLL Form – Disclosure of Lobbying Activities (only if applicable)
(<http://www2.ed.gov/fund/grant/apply/appforms/appforms.html>).

Assurances

The designated State agency or designated State unit, as appropriate and identified in the State certifications included with this VR services portion of the *Unified or Combined* State Plan and

its supplement, through signature of the authorized individual, assures the Commissioner of the Rehabilitation Services Administration (RSA), that it will comply with all of the requirements of the VR services portion of the *Unified or Combined State Plan* and its supplement, as set forth in sections 101(a) and 606 of the Rehabilitation Act. The individual authorized to submit the VR services portion of the *Unified or Combined State Plan* and its supplement makes the following assurances: The *State Plan* must provide assurances that:

1. Public Comment on Policies and Procedures:

The designated State agency assures it will comply with all statutory and regulatory requirements for public participation in the VR Services Portion of the *Unified or Combined State Plan*, as required by section 101(a)(16)(A) of the Rehabilitation Act.

2. Submission of the VR services portion of the *Unified or Combined State Plan* and Its Supplement:

The designated State unit assures it will comply with all requirements pertaining to the submission and revisions of the VR services portion of the *Unified or Combined State Plan* and its supplement for the State Supported Employment Services program, as required by sections 101(a)(1), (22), (23), and 606(a) of the Rehabilitation Act; section 102 of WIOA in the case of the submission of a unified plan; section 103 of WIOA in the case of a submission of a *Combined State Plan*; 34 CFR 76.140.

3. Administration of the VR services portion of the *Unified or Combined State Plan*:

The designated State agency or designated State unit, as appropriate, assures it will comply with the requirements related to:

- a. the establishment of the designated State agency and designated State unit, as required by section 101(a)(2) of the Rehabilitation Act.
- b. the establishment of either a State independent commission or State Rehabilitation Council, as required by section 101(a)(21) of the Rehabilitation Act.

The designated State agency or designated State unit, as applicable (B) has established a State Rehabilitation Council

- c. consultations regarding the administration of the VR services portion of the *Unified or Combined State Plan*, in accordance with section 101(a)(16)(B) of the Rehabilitation Act.

- d. the financial participation by the State, or if the State so elects, by the State and local agencies, to provide the amount of the non-Federal share of the cost of carrying out the VR program in accordance with section 101(a)(3).

- e. the local administration of the VR services portion of the *Unified or Combined State Plan*, in accordance with section 101(a)(2)(A) of the Rehabilitation Act.

The designated State agency allows for the local administration of VR funds: No

f. the shared funding and administration of joint programs, in accordance with section 101(a)(2)(A)(ii) of the Rehabilitation Act.

The designated State agency allows for the shared funding and administration of joint programs: No

g. statewideness and waivers of statewideness requirements, as set forth in section 101(a)(4) of the Rehabilitation Act.

Is the designated State agency requesting or maintaining a waiver of statewideness for one or more services provided under the VR services portion of the *Unified or Combined State Plan*? See Section 2 of this VR services portion of the *Unified or Combined State Plan*: No

h. the descriptions for cooperation, collaboration, and coordination, as required by sections 101(a)(11) and (24)(B); and 606(b) of the Rehabilitation Act.

i. all required methods of administration, as required by section 101(a)(6) of the Rehabilitation Act.

j. the requirements for the comprehensive system of personnel development, as set forth in section 101(a)(7) of the Rehabilitation Act.

k. the compilation and submission to the Commissioner of statewide assessments, estimates, State goals and priorities, strategies, and progress reports, as appropriate, and as required by sections 101(a)(15), 105(c)(2), and 606(b)(8) of the Rehabilitation Act.

l. the reservation and use of a portion of the funds allotted to the State under section 110 of the Rehabilitation Act for the development and implementation of innovative approaches to expand and improve the provision of VR services to individuals with disabilities, particularly individuals with the most significant disabilities.

m. the submission of reports as required by section 101(a)(10) of the Rehabilitation Act.

4. Administration of the Provision of VR Services:

The designated State agency, or designated State unit, as appropriate, assures that it will:

a. comply with all requirements regarding information and referral services in accordance with sections 101(a)(5)(D) and (20) of the Rehabilitation Act.

b. impose no duration of residence requirement as part of determining an individual's eligibility for VR services or that excludes from services under the plan any individual who is present in the State in accordance with section 101(a)(12) of the Rehabilitation Act.

c. provide the full range of services listed in section 103(a) of the Rehabilitation Act as appropriate, to all eligible individuals with disabilities in the State who apply for services in accordance with section 101(a)(5) of the Rehabilitation Act?

Agency will provide the full range of services described above

d. determine whether comparable services and benefits are available to the individual in accordance with section 101(a)(8) of the Rehabilitation Act.

e. comply with the requirements for the development of an individualized plan for employment in accordance with section 102(b) of the Rehabilitation Act.

f. comply with requirements regarding the provisions of informed choice for all applicants and eligible individuals in accordance with section 102(d) of the Rehabilitation Act.

g. provide vocational rehabilitation services to American Indians who are individuals with disabilities residing in the State, in accordance with section 101(a)(13) of the Rehabilitation Act.

h. comply with the requirements for the conduct of semiannual or annual reviews, as appropriate, for individuals employed either in an extended employment setting in a community rehabilitation program or any other employment under section 14(c) of the Fair Labor Standards Act of 1938, as required by section 101(a)(14) of the Rehabilitation Act.

i. meet the requirements in sections 101(a)(17) and 103(b)(2) of the Rehabilitation Act if the State elects to construct, under special circumstances, facilities for community rehabilitation programs

j. with respect to students with disabilities, the State, has developed and will implement,

A. strategies to address the needs identified in the assessments; and

B. strategies to achieve the goals and priorities identified by the State, to improve and expand vocational rehabilitation services for students with disabilities on a statewide basis; and has developed and will implement strategies to provide pre-employment transition services (sections 101(a)(15) and 101(a)(25)).

5. Program Administration for the Supported Employment Title VI Supplement:

a. The designated State unit assures that it will include in the VR services portion of the *Unified* or *Combined State Plan* all information required by section 606 of the Rehabilitation Act.

b. The designated State agency assures that it will submit reports in such form and in accordance with such procedures as the Commissioner may require and collects the information required by section 101(a)(10) of the Rehabilitation Act separately for individuals receiving supported employment services under title I and individuals receiving supported employment services under title VI of the Rehabilitation Act.

c. The designated state unit will coordinate activities with any other State agency that is functioning as an employment network under the Ticket to Work and Self-Sufficiency program under Section 1148 of the Social Security Act.

6. Financial Administration of the Supported Employment Program:

a. The designated State agency assures that it will expend no more than 2.5 percent of the State's allotment under title VI for administrative costs of carrying out this program; and, the designated State agency or agencies will provide, directly or indirectly through public or private entities, non-Federal contributions in an amount that is not less than 10 percent of the costs of carrying out supported employment services provided to youth with the most significant disabilities with the funds reserved for such purpose under section 603(d) of the Rehabilitation Act, in accordance with section 606(b)(7)(G) and (H) of the Rehabilitation Act.

b. The designated State agency assures that it will use funds made available under title VI of the Rehabilitation Act only to provide supported employment services to individuals with the most significant disabilities, including extended services to youth with the most significant disabilities, who are eligible to receive such services; and, that such funds are used only to supplement and not supplant the funds provided under Title I of the Rehabilitation Act, when providing supported employment services specified in the individualized plan for employment, in accordance with section 606(b)(7)(A) and (D), of the Rehabilitation Act.

7. Provision of Supported Employment Services:

a. The designated State agency assures that it will provide supported employment services as defined in section 7(39) of the Rehabilitation Act.

b. The designated State agency assures that:

The comprehensive assessment of individuals with significant disabilities conducted under section 102(b)(1) of the Rehabilitation Act and funded under title I of the Rehabilitation Act includes consideration of supported employment as an appropriate employment outcome, in accordance with the requirements of section 606(b)(7)(B) of the Rehabilitation Act

An individualized plan for employment that meets the requirements of section 102(b) of the Rehabilitation Act, which is developed and updated with title I funds, in accordance with sections 102(b)(3)(F) and 606(b)(6)(C) and (E) of the Rehabilitation Act.

VOCATIONAL REHABILITATION CERTIFICATIONS/ASSURANCES/CERTIFICATIONS

States must provide written and signed certifications that:	
1.	The (enter the name of designated State agency or designated State unit, as appropriate,) is authorized to submit the VR services portion of the <i>Unified or Combined State Plan</i> under

	title I of the Rehabilitation Act of 1973 (Rehabilitation Act), as amended by WIOA, ¹³ and its supplement under title VI of the Rehabilitation Act ¹⁴ ;
	The Massachusetts Rehabilitation Commission is authorized to submit the VR services portion of the <i>Unified or Combined State Plan</i> under title I of the Rehabilitation Act of 1973 (Rehabilitation Act), as amended by WIOA, ¹⁵ and its supplement under title VI of the Rehabilitation Act ¹⁶ ;
	The Commissioner of the Massachusetts Commission for the Blind is authorized to submit the VR services portion of the <i>Unified or Combined State Plan</i> under title I of the Rehabilitation Act of 1973 (Rehabilitation Act), as amended by WIOA, ¹⁷ and its supplement under title VI of the Rehabilitation Act ¹⁸ ;
2.	As a condition for the receipt of Federal funds under title I of the Rehabilitation Act for the provision of VR services, the (enter the name of designated State agency) ¹⁹ agrees to operate and administer the State VR Services Program in accordance with the VR services portion of the <i>Unified or Combined State Plan</i> ²⁰ , the Rehabilitation Act, and all applicable regulations ²¹ , policies, and procedures established by the Secretary of Education. Funds made available under section 111 of the Rehabilitation Act are used solely for the provision of VR services and the administration of the VR services portion of the <i>Unified or Combined State Plan</i> ;
	As a condition for the receipt of Federal funds under title I of the Rehabilitation Act for the provision of VR services, the Massachusetts Rehabilitation Commission agrees to operate and administer the State VR Services Program in accordance with the VR services portion of the <i>Unified or Combined State Plan</i> ²² , the Rehabilitation Act, and all applicable regulations ²³ , policies, and procedures established by the Secretary of Education. Funds made available under <i>section 111</i> of the Rehabilitation Act are used solely for the provision of VR services and the administration of the VR services portion of the <i>Unified or Combined State Plan</i> ;

¹³ Public Law 113-128.

¹⁴ Unless otherwise stated, “Rehabilitation Act” means the Rehabilitation Act of 1973, as amended by WIOA, signed into law on July 22, 2014.

¹⁵ Public Law 113-128.

¹⁶ Unless otherwise stated, “Rehabilitation Act” means the Rehabilitation Act of 1973, as amended by WIOA, signed into law on July 22, 2014.

¹⁷ Public Law 113-128.

¹⁸ Unless otherwise stated, “Rehabilitation Act” means the Rehabilitation Act of 1973, as amended by WIOA, signed into law on July 22, 2014.

¹⁹ All references in this plan to “designated State agency” or to “the State agency” relate to the agency identified in this paragraph.

²⁰ No funds under title I of the Rehabilitation Act may be awarded without an approved VR services portion of the *Unified or Combined State Plan* in accordance with section 101(a) of the Rehabilitation Act.

²¹ Applicable regulations, in part, include the Education Department General Administrative Regulations (EDGAR) in 34 CFR parts 76, 77, 79, 81, and 82; 2 CFR part 200 as adopted by 2 CFR part 3485; and the State VR Services Program regulations.

²² No funds under title I of the Rehabilitation Act may be awarded without an approved VR services portion of the *Unified or Combined State Plan* in accordance with section 101(a) of the Rehabilitation Act.

²³ Applicable regulations, in part, include the Education Department General Administrative Regulations (EDGAR) in 34 CFR parts 76, 77, 79, 81, and 82; 2 CFR part 200 as adopted by 2 CFR part 3485; and the State VR Services Program regulations.

	As a condition for the receipt of Federal funds under title I of the Rehabilitation Act for the provision of VR services, the Massachusetts Commission for the Blind ²⁴ agrees to operate and administer the State VR Services Program in accordance with the VR services portion of the <i>Unified or Combined State Plan</i> ²⁵ , the Rehabilitation Act, and all applicable regulations ²⁶ , policies, and procedures established by the Secretary of Education. Funds made available under <i>section 111</i> of the Rehabilitation Act are used solely for the provision of VR services and the administration of the VR services portion of the Unified or Combined State Plan;
3.	As a condition for the receipt of Federal funds under title VI of the Rehabilitation Act for supported employment services, the designated State agency agrees to operate and administer the State Supported Employment Services Program in accordance with the supplement to the VR services portion of the <i>Unified or Combined State Plan</i> ²⁷ , the Rehabilitation Act, and all applicable regulations ²⁸ , policies, and procedures established by the Secretary of Education. Funds made available under title VI are used solely for the provision of supported employment services and the administration of the supplement to the VR services portion of the <i>Unified or Combined State Plan</i> ;
	As a condition for the receipt of Federal funds under title VI of the Rehabilitation Act for supported employment services, the Massachusetts Rehabilitation Commission agrees to operate and administer the State Supported Employment Services Program in accordance with the supplement to the VR services portion of the <i>Unified or Combined State Plan</i> ²⁹ , the Rehabilitation Act, and all applicable regulations ³⁰ , policies, and procedures established by the Secretary of Education. Funds made available under title VI are used solely for the provision of supported employment services and the administration of the supplement to the VR services portion of the <i>Unified or Combined State Plan</i> ;
	As a condition for the receipt of Federal funds under title VI of the Rehabilitation Act for supported employment services, Massachusetts Commission for the Blind agrees to operate and administer the State Supported Employment Services Program in accordance with the supplement to the VR services portion of the <i>Unified or Combined State Plan</i> ³¹ ,

²⁴ All references in this plan to “designated State agency” or to “the State agency” relate to the agency identified in this paragraph.

²⁵ No funds under title I of the Rehabilitation Act may be awarded without an approved VR services portion of the *Unified or Combined State Plan* in accordance with section 101(a) of the Rehabilitation Act.

²⁶ Applicable regulations, in part, include the Education Department General Administrative Regulations (EDGAR) in 34 CFR parts 76, 77, 79, 81, and 82; 2 CFR part 200 as adopted by 2 CFR part 3485; and the State VR Services Program regulations.

²⁷ No funds under title VI of the Rehabilitation Act may be awarded without an approved supplement to the VR services portion of the *Unified or Combined State Plan* in accordance with section 606(a) of the Rehabilitation Act.

²⁸ Applicable regulations, in part, include the citations in footnote 6.

²⁹ No funds under title VI of the Rehabilitation Act may be awarded without an approved supplement to the VR services portion of the *Unified or Combined State Plan* in accordance with section 606(a) of the Rehabilitation Act.

³⁰ Applicable regulations, in part, include the citations in footnote 6.

³¹ No funds under title VI of the Rehabilitation Act may be awarded without an approved supplement to the VR services portion of the *Unified or Combined State Plan* in accordance with section 606(a) of the Rehabilitation Act.

	the Rehabilitation Act, and all applicable regulations ³² , policies, and procedures established by the Secretary of Education. Funds made available under title VI are used solely for the provision of supported employment services and the administration of the supplement to the VR services portion of the <i>Unified or Combined State Plan</i> ;
4.	The designated State agency and/or the designated State unit has the authority under State law to perform the functions of the State regarding the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement;
	The Massachusetts Rehabilitation Commission has the authority under State law to perform the functions of the State regarding the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement;
	The Massachusetts Commission for the Blind has the authority under State law to perform the functions of the State regarding the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement;
5.	The State legally may carry out each provision of the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement;
	The Massachusetts Rehabilitation Commission legally may carry out each provision of the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement;
	The Massachusetts Commission for the Blind legally may carry out each provision of the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement;
6.	All provisions of the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement are consistent with State law;
	All provisions of the VR services portion of the <i>Combined State Plan</i> and its supplement carried out by the Massachusetts Rehabilitation Commission are consistent with State law;
	All provisions of the VR services portion of the <i>Combined State Plan</i> and its supplement carried out by the Massachusetts Commission for the Blind are consistent with State law;
7.	The (enter title of State officer below) has the authority under State law to receive, hold, and disburse Federal funds made available under the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement;
	The Commissioner of the Massachusetts Rehabilitation Commission has the authority under State law to receive, hold, and disburse Federal funds made available under the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement;
	The Commissioner of the Massachusetts Commission for the Blind has the authority under State law to receive, hold, and disburse Federal funds made available under the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement;
8.	The (enter title of State officer below) has the authority to submit the VR services portion of the <i>Unified or Combined State Plan</i> and the supplement for Supported Employment services;

³² Applicable regulations, in part, include the citations in footnote 6.

	The Commissioner of the Massachusetts Rehabilitation Commission has the authority to submit the VR services portion of the <i>Unified or Combined State Plan</i> and the supplement for Supported Employment services;
	The Commissioner of the Massachusetts Commission for the Blind has the authority to submit the VR services portion of the <i>Unified or Combined State Plan</i> and the supplement for Supported Employment services;
9.	The agency that submits the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement has adopted or otherwise formally approved the plan and its supplement;
	The Commissioner of the Massachusetts Rehabilitation Commission submits the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement has adopted or otherwise formally approved the plan and its supplement;
	The Commissioner of the Massachusetts Commission for the Blind submits the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement has adopted or otherwise formally approved the plan and its supplement.

ASSURANCES

The designated State agency or designated State unit, as appropriate and identified in the State certifications included with this VR services portion of the *Unified or Combined State Plan* and its supplement, through signature of the authorized individual, assures the Commissioner of the Rehabilitation Services Administration (RSA), that it will comply with all of the requirements of the VR services portion of the *Unified or Combined State Plan* and its supplement, as set forth in sections 101(a) and 606 of the Rehabilitation Act. The individual authorized to submit the VR services portion of the *Unified or Combined State Plan* and its supplement makes the following assurances:

Vocational Rehabilitation Assurances

[Massachusetts' state plan continues to include required assurances.](#)

The State Plan must provide assurances that:	
1.	Public Comment on Policies and Procedures: The designated State agency assures it will comply with all statutory and regulatory requirements for public participation in the VR Services Portion of the <i>Unified or Combined State Plan</i> , as required by section 101(a)(16)(A) of the Rehabilitation Act.
2.	Submission of the VR services portion of the <i>Unified or Combined State Plan</i> and Its Supplement: The designated State unit assures it will comply with all requirements pertaining to the submission and revisions of the VR services portion of the <i>Unified or Combined State Plan</i> and its supplement for the State Supported Employment Services program, as required by <i>sections 101(a)(1), (22), (23), and 606(a)</i> of the Rehabilitation Act; <i>section 102</i> of WIOA in the case of the submission of a unified plan; <i>section 103</i> of WIOA in the case of a submission of a <i>Combined State Plan</i> ; 34 CFR 76.140.

3.	Administration of the VR services portion of the Unified or Combined State Plan: The designated State agency or designated State unit, as appropriate, assures it will comply with the requirements related to: (a) the establishment of the designated State agency and designated State unit, as required by <i>section 101(a)(2)</i> of the Rehabilitation Act. (b) the establishment of either a State independent commission or State Rehabilitation Council, as required by <i>section 101(a)(21)</i> of the Rehabilitation Act. The designated State agency or designated State unit, as applicable (Option A or B must be selected): (A) is an independent State commission. (B) has established a State Rehabilitation Council (c) consultations regarding the administration of the VR services portion of the Unified or Combined State Plan, in accordance with <i>section 101(a)(16)(B)</i> of the Rehabilitation Act. The non-Federal share, as described in 34 CFR 361.60. (d) the financial participation by the State, or if the State so elects, by the State and local agencies, to provide the amount of the non-Federal share of the cost of carrying out the VR program in accordance with <i>section 101(a)(3)</i>. (e) the local administration of the VR services portion of the <i>Unified or Combined State Plan</i>, in accordance with <i>section 101(a)(2)(A)</i> of the Rehabilitation Act. Select yes or no, as appropriate, to identify if the designated State agency allows for the local administration of VR funds, (Yes/No) (f) the shared funding and administration of joint programs, in accordance with <i>section 101(a)(2)(A)(ii)</i> of the Rehabilitation Act. Select yes or no, as appropriate, to identify if the designated State agency allows for the shared funding and administration of joint programs. (Yes/No) (g) statewideness and waivers of statewideness requirements, as set forth in <i>section 101(a)(4)</i> of the Rehabilitation Act. Is the designated State agency is requesting or maintaining a waiver of statewideness for one or more services provided under the VR services portion of the <i>Unified or Combined State Plan</i>? (Yes/No) See Section 2 of this VR services portion of the <i>Unified or Combined State Plan</i>. (h) the descriptions for cooperation, collaboration, and coordination, as required by <i>sections 101(a)(11), (24)(B), and 606(b)</i> of the Rehabilitation Act. (i) all required methods of administration, as required by <i>section 101(a)(6)</i> of the Rehabilitation Act. (j) the requirements for the comprehensive system of personnel development, as set forth in <i>section 101(a)(7)</i> of the Rehabilitation Act. (k) the compilation and submission to the Commissioner of statewide assessments, estimates, State goals and priorities, strategies, and progress reports, as appropriate, and as required by <i>sections 101(a)(15), 105(c)(2), and 606(b)(8)</i> of the Rehabilitation Act. (l) the reservation and use of a portion of the funds allotted to the State under <i>section 110</i> of the Rehabilitation Act for the development and implementation of innovative approaches to expand and improve the provision of VR services

	to individuals with disabilities, particularly individuals with the most significant disabilities. (m) the submission of reports as required by section 101(a)(10) of the Rehabilitation Act.
4.	Administration of the Provision of VR Services: The designated State agency, or designated State unit, as appropriate, assures that it will: (a) comply with all requirements regarding information and referral services in accordance with section 101(a)(5)(D) and (20) of the Rehabilitation Act. (b) impose no duration of residence requirement as part of determining an individual's eligibility for VR services or that excludes from services under the plan any individual who is present in the State in accordance with section 101(a)(12) of the Rehabilitation Act. (c) provide the full range of services listed in section 103(a) of the Rehabilitation Act as appropriate, to all eligible individuals with disabilities in the State who apply for services in accordance with section 101(a)(5) of the Rehabilitation Act? (Yes/No) (d) determine whether comparable services and benefits are available to the individual in accordance with section 101(a) (5) of the Rehabilitation Act. (e) comply with the requirements for the development of an individualized plan for employment in accordance with section 102(b) of the Rehabilitation Act. (f) comply with requirements regarding the provisions of informed choice for all applicants and eligible individuals in accordance with section 102(d) of the Rehabilitation Act. (g) provide vocational rehabilitation services to American Indians who are individuals with disabilities residing in the State, in accordance with section 101(a)(13) of the Rehabilitation Act. (h) comply with the requirements for the conduct of semiannual or annual review, as appropriate, for individuals employed either in an extended employment setting in a community rehabilitation program or any other employment under section 14(c) of the Fair Labor Standards Act, as required by section 101(a)(14) of the Rehabilitation Act. (i) meet the requirements in sections 101(a)(17) and 103(b)(2) of the Rehabilitation Act if the State elects to construct, under special circumstances, facilities for community rehabilitation programs (j) with respect to students with disabilities, the State, (A) has developed and will implement, (i) strategies to address the needs identified in the assessments; and (ii) strategies to achieve the goals and priorities identified by the State, to improve and expand vocational rehabilitation services for students with disabilities on a statewide basis; and (B) has developed and will implement strategies to provide pre-employment transition services (sections 101(a) (15) and 101 (a) (25)).
	MRC will do a survey to further identify the needs of transitioning students with disabilities to develop strategies to address those needs. MRC has developed

	Pre-employment training services for high school students with disabilities which will be implemented as part of <i>MRC's State Plan</i> under WIOA.
5.	Administration of the VR services portion of the <i>Unified or Combined State Plan</i>: The designated State agency or designated State unit, as appropriate, assures it will comply with the requirements related to: (a) the establishment of the designated State agency and designated State unit, as required by section 101(a)(2) of the Rehabilitation Act. (b) The establishment of either a State independent commission or State Rehabilitation Council, as required by section 101(a)(21) of the Rehabilitation Act. The designated State agency or designated State unit, as applicable (option A or B must be selected): (A) is an independent State commission. (B) has established a State Rehabilitation Council. (c) Consultation regarding the administration of the VR services portion of the <i>Unified or Combined State Plan</i>, in accordance with section 101(a)(16)(B) of the Rehabilitation Act. (d) The financial participation by the State, or if the State so elects, by the State and local agencies, to provide the amount of non-Federal share of the cost of carrying out the VR program in accordance with section 101(a)(3). (e) The local administration of the VR services portion of the <i>Unified or Combined State Plan</i>, in accordance with section 101(a)(2)(A) of the Rehabilitation Act. Select yes or no, as appropriate, to identify if the designated State agency allows for the local administration of VR funds. (Yes/No) (f) The shared funding and administration of joint programs, in accordance with section 101(a)(2)(A)(ii) of the Rehabilitation Act. Select yes or no, as appropriate, to identify if the designated State agency allows for the shared funding and administration of joint programs. (Yes/No) (g) Statewideness and waivers of statewideness requirements, as set forth in section 101(a)(4) of the Rehabilitation Act. Is the designated State agency is requesting or maintaining a waiver of statewideness for one or more services provided under the VR services portions of the <i>Unified or Combined State Plan</i>? (Yes/No) See Section 2 of this VR services portion of the <i>Unified or Combined State Plan</i>. (h) The descriptions for cooperation, collaboration, and coordination, as required by sections 101(a)(11), (24)(B), and 606(b) of the Rehabilitation Act. (i) All required methods of administration, as required by section 101(a)(6) of the Rehabilitation Act. (j) The requirements for the comprehensive system of personnel development, as set forth in section 101(a)(7) of the Rehabilitation Act. (k) The compilation and submission to the Commissioner of statewide assessments, estimates, State goals and priorities, strategies, and progress reports, as appropriate, and as required by sections 101(a)(15), 105(c)(2), and 606(b)(8) of the Rehabilitation Act.

	(l) The reservation and use of a portion of the funds allotted to the State under section 110 of the Rehabilitation Act for the development and implementation of innovative approaches to expand and improve the provision of VR services to individuals with disabilities, particularly individuals with the most significant disabilities. (m) The submission of reports as required by section 101(a)(10) of the Rehabilitation Act.
6.	(a) Financial Administration of the Supported Employment Program: The designated State agency assures that it will expend no more than 2.5% of the State's allotment under title VI for administrative costs of carrying out this program; and, the designated State agency or agencies will provide, directly or indirectly through public or private entities, non-Federal contributions in an amount that is not less than 10% of the costs of carrying out supported employment services provided to youth with the most significant disabilities with the funds reserved for such purpose under section 603(d) of the Rehabilitation Act, in accordance with section 606(b)(7)(G) and (H) of the Rehabilitation Act. (b) The designated State agency assures that it will use funds made available under title VI of the Rehabilitation Act only to provide supported employment services to individuals with the most significant disabilities, including extended services to youth with the most significant disabilities, who are eligible to receive such services; and, that such funds are used only to supplement and not supplant the funds provided under Title I of the Rehabilitation Act, when providing supported employment services specified in the individualized plan for employment, in accordance with section 606(b)(7)(A) and (D), of the Rehabilitation Act.
7.	(a) Provision of Supported Employment Services: The designated State agency assures that it will provide supported employment services as defined in section 7(39) of the Rehabilitation Act. (b) The designated State agency assures that: i. the comprehensive assessment of individuals with significant disabilities conducted under section 102(b)(1) of the Rehabilitation Act and funded under title I of the Rehabilitation Act includes consideration of supported employment as an appropriate employment outcome, in accordance with the requirements of section 606(b)(7)(B) of the Rehabilitation Act ii. an individualized plan for employment that meets the requirements of section 102(b) of the Rehabilitation Act, which is developed and updated with title I funds, in accordance with sections 102(b)(3)(F) and 606(b)(6)(C) and (E) of the Rehabilitation Act.

VII. PROGRAM-SPECIFIC REQUIREMENTS FOR *COMBINED STATE PLAN* PARTNER PROGRAMS

TEMPORARY ASSISTANCE FOR NEEDY FAMILIES PROGRAM (TANF)

TANF - TWO YEAR UPDATE

Massachusetts's TANF policy framework has evolved to include a stronger emphasis on workforce engagement and clearer operational mechanics for moving recipients toward employment. TANF is placing greater emphasis on structured participation through Individualized Pathways Plans, engagement with Full Engagement Workers (FEWs), and clearer expectations around work participation and job readiness. Consistent with the prioritization of strengthening worker mobility and connecting individuals to employment pathways, this shift reflects a more explicit work-first orientation in program administration.

Additionally, TANF services are being more broadly integrated with the workforce development system across the state. Through increased coordination with MassHire Career Centers, WIOA partner agencies, and employment service providers, Massachusetts is working to ensure that TANF recipients are connected to training programs and job opportunities that support long-term employment. TANF is a component of the Commonwealth's talent pipeline and these integrations enable TANF to operate as part of the broader workforce ecosystem, in closer coordination with workforce and economic development systems, rather than as a standalone safety-net program.

The program is working to place greater emphasis on employment retention and reducing barriers that prevent recipients from staying in the workforce. The program continues to focus on easing the transition from benefits to work and mitigating the benefits cliff, including transitional supports—such as child-care subsidies, transportation assistance, and temporary stipends—to help families maintain employment after exiting cash assistance. Additional policy improvements include greater operational clarity around program structure, participation requirements, and administrative responsibilities across state agencies, with an emphasis on accountability, workforce alignment, and sustained employment outcomes. The Department of Transitional Assistance and the TANF program continue to support and empower workers in times of economic transition as they work to achieve long-term economic self-sufficiency.

States that include TANF in the *Combined State Plan* must outline how the State will meet the requirements of section 402 of the Social Security Act including how it will:

a. Conduct a program designed to serve all political subdivisions in the State (not necessarily in a uniform manner) that provides assistance to needy families with (or expecting) children and provides parents with job preparation, work, and support services to enable them to leave the program, specifically cash assistance, and become self-sufficient (section 402(a)(1)(A)(i) of the Social Security Act).

TAFDC is the state's principal TANF program. It is administered through the Department of Transitional Assistance (DTA) and operates uniformly throughout the state.

The TAFDC program provides economic assistance, employment and training opportunities, and supportive services for families with dependent children and some expectant parents. The goal

of the program is to help families achieve economic mobility through meaningful employment. TAFDC is also provided to children who are being cared for by a relative who is not their natural or adoptive parent.

The state statute governing the TAFDC program can be found in Title XVII, Chapter 118 of the Massachusetts General Laws, located at <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleXVII/Chapter118E>. The regulations can be found in 106 CMR 701 -708 located at mass.gov/lists/departments-of-transitional-assistance-regulations. Procedural guidance can be found in DTA's online guide at: https://eohhs.ehs.state.ma.us/DTA/PolicyOnline/BEACON5/!SSL!/WebHelp/userguide_test.htm.

Application

Financial eligibility for the program is determined by income limits. Income limits can be found at mass.gov/doc/table-of-need-standards-as-referenced-at-106-cmr-704410-0/. Regulations regarding financial eligibility can be found at 106 CMR 704.000, et seq. Whenever an application is made for a dependent child, the parents of that child who are living in the same household and the siblings of that child living in the same household must also be included in the application. When someone who is not the parent of the dependent child is applying, they can choose to be included in the application or not. When an application is made for a pregnant woman, only the pregnant woman is included in the application. Anyone receiving SSI is never included in the application. Rules about who is included in an application can be found at 106 CMR 704.305. Certain families, who are assessed as work ready, are connected to employment opportunities when applying for benefits through registering an account with [MassHire JobQuest](https://jobquest.dcs.eol.mass.gov/jobquest/) at <https://jobquest.dcs.eol.mass.gov/jobquest/>. Once a family begins receiving benefits, they are introduced to free opportunities for employment, training, and education and supportive services.

Case Management and Employment Services

Each local DTA office has case managers and Full Engagement Workers (FEWs). Case managers carry a caseload and are responsible for eligibility determination, eligibility review, referral services and other case maintenance activities. FEWs are specialists in the employment, education, and training opportunities available to families receiving TAFDC. In partnership with the case manager, the FEW is responsible for connecting families to opportunities and supportive services. They serve as a resource to case managers, a liaison for employment and training program providers and a point of both contact and support to families. They work on both initial engagement with education and training options and re-engagement for families who have stopped participating in an approved activity. FEWs maintain a presence in the MassHire Career Centers and work with other community partners such as shelters to reach and engage families regardless of their circumstances.

Orientation and Assessment

All families receiving TAFDC are offered the opportunity to participate in an orientation and assessment. Case managers refer families who are either interested in participating or are required to participate to a FEW. The FEW conducts an orientation with families to introduce

them to all available resources and provides an assessment that helps parents or caretakers decide on family, education, or employment goals on which they are motivated to work. The FEW then connects the parent or caretaker with a program that can help them achieve that goal. The FEW will also facilitate the enrollment process with the program provider and follow up with both the family and the program in the next few weeks to make sure the program is the right fit for the family.

Employment Development Plan (EDP)

Every parent or caretaker who is required to participate in the work program must have an EDP. The EDP contains the parent or caretaker's employment goal, the schedule of Employment Service Program activities they must engage in, necessary support services and the requirements they must meet to avoid sanctions.

Supportive Services

Families receiving TAFDC are offered supportive services to help them meet their goals. All families are eligible to receive domestic violence supports. Families who are participating in employment, education and training are eligible to receive fully subsidized childcare and a transportation stipend. Relative caregivers are eligible to receive fully subsidized childcare. In addition to these supportive services, parents and caregivers participating in the DTA Works Internship program receive mentoring.

Childcare

DTA provides referrals to families that are eligible for a childcare subsidy based on their TAFDC program participation and to all relative caregivers. A childcare referral is provided to all clients with an approved EDP who need childcare to accept or maintain employment or to participate in an employment, education, or training program. Case managers are required to inform families about the availability of childcare at application and review. FEWs are required to inform families about the availability of childcare whenever they are engaging with a family that does not already have subsidized childcare. A childcare fact sheet, [CCFS-English 2016.pub](https://www.mass.gov/doc/learn-about-child-care-resources-ccfs-english-and-spanish-pdf/), [mass.gov/doc/learn-about-child-care-resources-ccfs-english-and-spanish-pdf/](https://www.mass.gov/doc/learn-about-child-care-resources-ccfs-english-and-spanish-pdf/) is provided to all families at least once a year. This fact sheet explains who is eligible for childcare, how to get a childcare referral, how to connect with the local childcare agency, the types of childcare available, how to find licensed childcare and supports available when your TAFDC case closes. Families who are working or are enrolled in an approved activity receive a referral for 12 months of fully subsidized childcare. The referral remains active even if the parent or caregiver loses employment or their activity ends. Families on TAFDC with childcare authorizations from DTA receive a subsidy for the full cost of childcare and are not charged a parent fee.

A family is eligible for a Transitional Childcare (TCC) referral for up to 12 months after their TAFDC case closes when they are employed for at least 20 hours a week or enrolled in an

education or training program. Families receiving TCC may be required to pay a parent fee by the Department of Early Education and Care (EEC), which is based on their income and family size. Upon verification that a family is eligible, DTA provides a written authorization for the TCC referral to EEC. This voucher is evidence of family relationship for all children included in the authorization. Parents must also submit evidence of their income, service need, residence and their relationship to children or dependent grandparents not included in the childcare authorization.

If a family demonstrates an inability to obtain needed childcare assistance will not be reduced or terminated. Lack of available and appropriate state-standard childcare is verified by a written, dated and signed statement from an appropriate official of the Department of Early Education and Care, stating that such services are unavailable during the hours of the applicant's or client's employment or training. If there is a breakdown of care not provided through a designated agency, a statement from the childcare provider, or, if not available, a written, dated and signed statement from the applicant or client must be submitted. Appropriate childcare is defined as each child-care provider, licensed by EEC, is generally considered an appropriate resource for recipients who need childcare. The Childcare Resource and Referral (CCRR) agency staff will assist TANF recipients in making informed decisions regarding the child-care search by assessing each family's needs and reviewing available child-care options, which include the entire mixed delivery system (center-based, family childcare, and license exempt options that are willing to enter into a voucher agreement at the state maximum rate for services). The CCRR makes referrals only to appropriate, licensed child-care providers and discusses licensed-exempt options, such as in-home and relative care. If the recipient refuses all referrals made by the CCRR, the recipient shall be deemed to have been offered appropriate and available childcare, unless the recipient can provide a reasonable explanation to EEC why the childcare should be considered unavailable to or inappropriate for the particular family.

Reasonable distance is defined as each child-care provider, licensed by EEC, is generally considered an appropriate resource for recipients who need childcare. The Childcare Resource and Referral (CCRR) agency staff will assist TANF recipients in making informed decisions regarding the childcare search by assessing each family's needs and reviewing available child-care options, which include the entire mixed delivery system (center-based, family childcare, and license exempt options that are willing to enter into a voucher agreement at the state maximum rate for services). The CCRR makes referrals only to appropriate, licensed child-care providers and discusses licensed-exempt options, such as in-home and relative care. If the recipient refuses all referrals made by the CCRR, the recipient shall be deemed to have been offered appropriate and available childcare, unless the recipient can provide a reasonable explanation to EEC why the childcare should be considered unavailable to or inappropriate for the particular family.

Unsuitability of informal childcare is defined as each child-care provider, licensed by EEC, is generally considered an appropriate resource for recipients who need childcare. The Child Care Resource and Referral (CCRR) agency staff will assist TANF recipients in making informed

decisions regarding the child care search by assessing each family's needs and reviewing available childcare options, which include the entire mixed delivery system (center-based, family child care, and license exempt options that are willing to enter into a voucher agreement at the state maximum rate for services). The CCRR makes referrals only to appropriate, licensed child-care providers and discusses licensed-exempt options, such as in-home and relative care. If the recipient refuses all referrals made by the CCRR, the recipient shall be deemed to have been offered appropriate and available childcare, unless the recipient can provide a reasonable explanation to EEC why the childcare should be considered unavailable to or inappropriate for the particular family.

Affordable childcare arrangements are defined as each child-care provider, licensed by EEC, is generally considered an appropriate resource for recipients who need childcare. The Childcare Resource and Referral (CCRR) agency staff will assist TANF recipients in making informed decisions regarding the child-care search by assessing each family's needs and reviewing available child-care options, which include the entire mixed delivery system (center-based, family childcare, and license exempt options that are willing to enter into a voucher agreement at the state maximum rate for services). The CCRR makes referrals only to appropriate, licensed child-care providers and discusses licensed-exempt options, such as in-home and relative care. If the recipient refuses all referrals made by the CCRR, the recipient shall be deemed to have been offered appropriate and available childcare, unless the recipient can provide a reasonable explanation to EEC why the childcare should be considered unavailable to or inappropriate for the family.

Employment Incentives

To support employment and ease the 'cliff effect', a parent or caretaker who is working while receiving TAFDC receives a 100% earned income disregard for the first six months of employment as long as their earned income does not exceed 200% of the Federal Poverty Level (FPL). After six months the family receives a \$200 work related expense deduction and a 50% earned income disregard. In a two-parent family each parent or caretaker is eligible for the earned income disregards.

Transitional Support Services (TSS)

When a TAFDC case closes due to earnings, an employed parent or caregiver will receive a stipend for four months to support their transition off TAFDC benefits into employment. The payments cover work related expenses and transportation costs and decrease over the four months.

Work-Related Expense Stipend	Transportation Stipend
Month 1 \$200	Month 1 \$80
Month 2 \$150	Month 2 \$60
Month 3 \$100	Month 3 \$40
Month 4 \$50	Month 4 \$20

Special Requirements for Young Parents

The eligibility rules for parents under 20 can be found at 106 CMR 703.180 - 184. To be eligible for TAFDC as a parent under 20, you must have graduated from high school, received a high school equivalency certificate or be attending school or a certificate program full time. Parents under the age of 20 who do not have a high school degree or the equivalent who are attending school or a high school equivalency program full time also have the option of participating in an employment and training program part time while they work on their high school equivalency certificate. Parents under 20 are not required to attend school full time for three months after the birth of their child. You also must be living with your parents, another adult related to you, another adult related to your child, a foster parent, or a legal guardian. The other adult or legal guardian cannot be the child's other parent unless the parents are married. A parent under 20 can also be living in a structured teen living program or on their own under certain conditions specified in 106 CMR 703.184. Parents under the age of 20 are eligible to receive fully subsidized childcare.

Parents under 20 who do not meet school attendance requirements without good cause are removed from the grant. If they continue to not meet school attendance requirements, the grant is terminated.

Self-Sufficiency Specialists (SSS)

The mandate to have SSS case managers is found in Mass. Gen. Laws Chapter 18, section 5. The primary focus of the SSS case managers are young parents, ages 23 and younger. SSS case managers carry a reduced caseload in order to provide intensive case management to specialized populations. The target case load for a SSS case manager is 90; each local office has enough SSS case managers to cover their young parent population at that case load ratio. If a SSS has room in their caseload, they may also serve other specialized populations, such as those living in an emergency shelter or a domestic violence shelter.

SSS case managers work with families to develop a solid foundation, including establishing education, training, and employment goals, as well as strategies to help with any challenges the family may have as they advance their economic mobility.

SSS case managers maintain a weekly presence at young parent program sites where the families on their caseload receive services. This allows SSS case managers to work collaboratively as a team with the program and the young parent to monitor progress, celebrate success and address any concerns or barriers that have come up for the program or the young parent.

Work Requirements and Hours

The rules for the TAFDC Work Program are found at 106 CMR 703.150. Parents and caretakers are allowed a 60-day work search period in which to find a job of 20 hours for those with children under 6 and 30 hours for those with children 6 and older. If a parent or caretaker who does not have an exemption from the work requirement or good cause (as defined below) is

not employed for the required number of hours by the end of the 60-day work search period, the parent or caretaker must participate in an education or training activity or work at a community service site. In two parent families, each parent or caretaker must meet the work requirement.

FEWs work with families from the time their case is opened to connect them to employment opportunities and connect them to programs that will help them meet their goals and find employment on a career track. At case approval, FEWs connect with families to let them know about all the resources available to them and explain the expectations of the program. FEWs then complete a series of activities including Orientation, Assessment, goal setting, facilitating referrals and providing supportive services. Once a family is employed or enrolled in a program, FEWs maintain regular contact with the family and the program to monitor progress and address any concerns before they become a barrier to employment or participation.

Work Activities

A parent or caregiver can meet their work program requirements by:

- Working a job for pay
- Working full time in the Full Employment Program (FEP) which provides individuals work experience needed to obtain an unsubsidized job. Participants are paid a subsidized wage in lieu of receiving TAFDC
- Participating in an approved supported work program
- Participating in community service (hours limited by the federal Fair Labor Standards Acts)
- Participating in a DTA approved activity that is expected to result in employment
- Combining hours of work and an approved activity or community service
- Participating in a substance abuse treatment program while living in a substance abuse shelter
- Participating in an unpaid work study or internship program
- Providing childcare to a teen parent's dependent child if both the teen parent and their child are living in their home so that the teen parent can meet their school attendance requirements
- Participating in an education or training activity including a certificate or degree program from a four-year institute of higher education, community college or certificate program provided the degree does not exceed a bachelor's degree
- Participating in a vocational or educational program for not more than 12 months; or
- Meeting housing search requirements while residing in emergency shelter

A complete list of qualified work activities can be found at 106 CMR 707.130 - 190.

Exemptions

Exemptions from the work program requirement and time limited benefits can be found in statute in Chapter 5, Section 110 (e)(1) of the Acts of 1995 and in regulation at 106 CMR 703.100 (A)(1). The exemption reasons are:

- Disability
- Being essential to the care of a disabled child, spouse or child's other parent living in the home
- 33rd week or later of pregnancy
- Having a child living in the home under age 2, except for a teen parent's dependent child if the teen parent is living in the home
- Being a parent under the age of 20 who is meeting living arrangement and school requirements
- Being a relative caregiver who is not part of the assistance unit
- Age 66 or older
- Age 60 – 66 who is the primary caregiver for the child and retired prior to receiving TAFDC

Good Cause

Parents or caregivers may claim good cause for failure to meet TAFDC work program requirements. These are found in regulation at 106 CMR 701.380 and include:

- Appropriate childcare is not available
- Family crisis or emergency situation
- Health condition or illness that prevents participation
- Lack of affordable or reliable transportation
- Participation in housing search in an emergency shelter
- Lack of an available and appropriate community service site

Sanctions for Non-Compliance

When a parent or caregiver is not engaged in work or an activity after 60 days or stops participating in work or an activity without good cause, they are removed from the grant and the grant is reduced to the lower household size until the parent or caregiver connects with the FEW and accepts a program referral. If the parent or caregiver does not participate after accepting a program referral, the grant is terminated for the whole family.

If a parent or caregiver does stop working or participating in a program, the FEW completes a number of outreach attempts to try and engage the parent or caretaker before the grant is reduced. These attempts include multiple phone calls, a letter, text messages and an alert on the DTA Connect application.

TAFDC Pathways to Work

TAFDC Pathways to Work is an integral part of DTA's efforts to move clients to work and provide meaningful career pathways that support economic mobility. Each year, the Legislature allocates funding for employment services for families receiving TAFDC through the Employment Services Program (ESP) line item. The primary goal of TAFDC Pathways to Work is to assist TAFDC clients obtain and maintain employment with career growth potential, resolve barriers to employment and provide families who receive TAFDC with education, training, and employment supports. FEWs assist families receiving TAFDC to achieve these outcomes through referral to and collaborative goal setting with programs appropriate for individual skill level and goals. In addition to employment education and training, learning disability assessments and high school equivalency testing support are also funded through the ESP line item.

Young Parent's Program (YPP)

YPP is designed to serve pregnant and/or parenting teens from the ages of 12-24 who are currently out of school and do not have a high school diploma or its equivalent or who wish to enroll in post-secondary education or training on a pathway to employment. Both the custodial and non-custodial parent of a child receiving TAFDC are eligible to participate in YPP. It is a year-round, full-time program that seeks to reduce reliance on public benefits among young parents by supporting outcomes across three domains: education and career, life and personal, and parenting and family.

Services offered through the YPP program include assessment and goal setting, academic support and curriculum, English for Speakers of Other Languages, life, and personal skills, enhancing family relationships, community partnerships for any additional services and follow-up services.

YPP takes a two-generation approach to increasing economic stability for families by creating opportunities for both parents and children. The primary goals of YPP are to empower parents to pursue a path to economic mobility through education pathways and job readiness, actively engage participants to develop the skills necessary to advocate and care for their children and provide a sense of hope and aspiration to empower families to break the cycle of multi-generational poverty.

DTA Works Internship

The goal of the DTA Works internship program is to provide employment supports to parents or caregivers receiving TAFDC through mentorship, training, and exposure and to prepare them for successful re-entry into the workforce. The program targets parents or caregivers who are fluent in English, can pass a Criminal Offender Record Information (CORI) check, have a high school diploma or its equivalent but have little to no work experience, professional networks,

or current references. The program places parents or caregivers in state agencies or nonprofits where they complete a nine-month internship. While they are completing their internship, parents or caregivers receive one on one mentoring and a monthly education and training stipend that does not impact their TAFDC benefits.

Temporary Absence

Massachusetts continues to exercise its option under section 408, paragraph (10)(A), of the Social Security Act to continue payment of TANF financial assistance benefits for a minor child absent from the home for at least 30 but not more than 180 consecutive days.

Time Limits

Families receiving TAFDC are subject to time-limited benefits unless they are exempt from the time limit. Non-exempt parents and caregivers, including each parent in a two-parent family, are limited to 24 months of assistance in any continuous 60-month period. The 60-month period begins the first full calendar month a family receives TAFDC benefits. Once 60 months have passed, the family is eligible for a new 60-month period and another 24 months within that 60-month period.

Other TANF Funded Programs

Income Eligible Childcare: Administered by Department of Early Education and Care (EEC), Income Eligible Childcare provides subsidized childcare for the children of low-income parents not receiving childcare through TAFDC who are working, disabled, in an education or job training program, or who otherwise meet the activity requirement. Childcare is provided for children under 13 and for older children with special needs. Parents who have a disability can also qualify for the subsidy in certain situations. The program pays a portion of the cost of care and requires payments from parents on a sliding fee scale. Regulations regarding financial eligibility can be found at 606 CMR 10.04.

Transitional and Post-Transitional Childcare: Also administered by EEC, parents who have received TAFDC within the 12 months prior to their application for a childcare subsidy and who obtain a childcare referral from DTA have priority access to a childcare subsidy, provided they meet EEC eligibility guidelines. Parents who seek eligibility following the parent's transitional TAFDC authorization will again receive priority access to a childcare subsidy for one additional 12-month period provided they meet EEC eligibility guidelines. Regulations regarding financial eligibility can be found at 606 CMR 10.04.

DHE Scholarship Reserve: The Scholarship Reserve provides financial assistance to Massachusetts students enrolled in and pursuing a program of higher education in any approved public or independent college, university, school of nursing, or any other approved institution furnishing a program of higher education. The scholarship program covers the cost of tuition for courses as well as the standard cost of living at the institution. These costs include only costs of attending courses and pursuing higher educational attainment and excludes costs such as room and board. Scholarships are claimed under TANF purposes 3 and 4 because

studies have shown that higher educational attainment correlates with a reduced incidence of out of wedlock pregnancy and that educational attainment increases the likelihood that a person will become a supportive member of a two-parent household. Therefore, scholarships that allow young adults in Massachusetts to pursue higher education can be reasonably calculated to prevent and reduce out of wedlock pregnancies and to encourage people to form two-parent families.

University of Massachusetts (UMASS) Scholarships: UMASS provides needs-based financial assistance to Massachusetts students enrolled in and pursuing a program of higher education at one of the UMASS locations: Boston, Lowell, Worcester, Amherst, or Dartmouth. The scholarship program covers the cost of tuition for courses as well as the standard costs associated with attending school. These costs include only costs of attending courses and pursuing higher educational attainment and excludes costs such as room and board. Scholarships are claimed under TANF purposes 3 and 4 because studies have shown that higher educational attainment correlates with a reduced incidence of out of wedlock pregnancy and that educational attainment increases the likelihood that a person will become a supportive member of a two-parent household. Therefore, scholarships that allow young adults in Massachusetts to pursue higher education can be reasonably calculated to prevent and reduce out of wedlock pregnancies and to encourage people to form two-parent families.

Supplemental Nutrition Allowance (SNA): Administered by DTA, this program offers a supplemental nutrition assistance benefit to certain SNAP clients who are not receiving TAFDC. Eligible families who are working and receiving SNAP or whose TAFDC cases close due to earnings and who are currently receiving Non-Public Assistance (NPA) SNAP benefits only and have an employment status that meets the work participation requirements as outlined in 106 CMR 705.250 will be provided a supplemental nutritional assistance benefit.

MOE-Funded Programs

TAFDC: Administered by DTA, TAFDC is the cash assistance program for families with children and some pregnant women with little to no income. Regulations regarding financial eligibility can be found at 106 CMR 704.000, et seq.

Employment Services Program (ESP): Administered by DTA, ESP is an employment-oriented program that supports the goal of ending dependence of needy parents on government benefits by promoting job preparation and work. Regulations regarding TAFDC financial eligibility can be found at 106 CMR 704.000, et seq. and 106 CMR 707.000, et seq.

Transportation in the TAFDC Account: Administered by DTA, TAFDC and former TAFDC families who have an approved EDP, and an active activity or employment receive transportation

payments to offset the cost of travel to and from the activity or worksite. Regulations regarding TAFDC financial eligibility can be found at 106 CMR 704.000, et seq.

ESP Pathways to Self-Sufficiency (PSS): Administered by DTA, PSS is used to assess work program required TAFDC families to help them set goals and develop a plan to meet those goals. Regulations regarding TAFDC financial eligibility can be found at 106 CMR 704.000, et seq.

DTA Administrative Expenses: This program covers the administrative activities related to TANF or MOE funded programs performed at DTA or other Massachusetts state government departments and entities that receive TANF or MOE funds through contracts with state government departments. Included under this program are the costs of payroll and fringe benefits, contracted employees, travel, office supplies, equipment, and office space.

Income Eligible Childcare: Administered by EEC, income Eligible Childcare provides subsidized childcare for the children of low-income parents not receiving childcare through TAFDC who are working, disabled, in an education or job training program, or who otherwise meet the activity requirement. Childcare is provided for children under 13 and for older children with special needs. This subsidy primarily provides access to affordable childcare for income eligible working families. It can also be utilized by parents in a training or education program. Lastly, parents with disabilities can also qualify for the subsidy in certain situations. The program pays a portion of the cost of care and requires payments from parents on a sliding scale based on income. Very low-income families and children in foster care or with a relative who is not legally responsible for them are exempt from sliding fee requirements. Regulations regarding financial eligibility can be found at 606 CMR 10.04

Emergency Assistance Contract Shelter: Administered by the Department of Housing and Community Development (DHCD), this program provides temporary shelter to financially eligible homeless TAFDC families and assists them in finding permanent housing. The program also includes case management services. Regulations regarding financial eligibility can be found at 760 CMR 67.02.

HomeBASE: Administered by DHCD, HomeBASE is for families who are homeless or at imminent risk of homelessness and meet basic qualifications for the state's Emergency Assistance shelter program. HomeBASE provides families with flexible funding as an alternative to shelter placement. HomeBASE can provide funds for first and last month's rent and a security deposit, furniture, a monthly stipend to pay rent for up to one year, utilities, travel costs and other expenses that would otherwise prevent a family from accessing a new home. In addition, families receive case management support and additional resources such as education, workforce development and childcare. Regulations regarding financial eligibility can be found at 760 CMR 65.03

Emergency Assistance Alternative Housing Program: Administered by DHCD, this program provides temporary shelter to financially eligible homeless families. Families are placed in

hotels or motels while seeking other suitable housing. Regulations regarding financial eligibility can be found at 760 CMR 67.02.

Emergency Assistance Case Management: Administered by DHCD, this program provides case management services to financially eligible homeless families within the Emergency Assistance program. Regulations regarding financial eligibility can be found at 760 CMR 67.02

Youth at Risk Grants: Administered by the Department of Public Health (DPH), these grants fund after school programs that provide academic remediation, job development and community service skills for disadvantaged youth. The expenditures included in this MOE claim only include the portion of the expenditures associated with the TAFDC eligible population. Regulations regarding financial eligibility can be found at 106 CMR 704.010.

Structured Teen Living: Administered by the Department of Children and Families (DCF), this program provides a safe living situation for pregnant and parenting mothers under the age of 20. While living in the residential facility mothers must attend high school or a high school equivalent certificate program if they have not already received their diploma or equivalent certificate and participate in classes for basic parenting skills, pregnancy prevention and basic life skills. To be eligible a young mother must be receiving TAFDC. The regulations regarding financial eligibility can be found at 106 CMR 704.010.

Family Stabilization Services: Administered by DCF, this program provides services to stabilize intact families to prevent the need for home removal. The service recipients must have been eligible for benefits that require less than 85% of state median income. Regulations regarding financial eligibility can be found at 110 CMR 7.031.

Safelink Domestic Violence Hotline: Administered by a third party, Casa Myrna, Safelink is a 24/7 hotline to provide assistance to those experiencing domestic violence. The hotline can provide assistance in a crisis as well as resources for long term stabilization. Regulations regarding financial eligibility can be found at 110 CMR 4.00.

Child Protective Services Investigations: DCF is responsible for protecting children and strengthening and supporting families. DCF social workers investigate allegations of abuse or neglect and often provide services to help families care for children in their home. Investigations often lead to a referral of parents to services where they learn new skills to meet their own needs and to build relationships with their children. Regulations regarding financial eligibility can be found at 110 CMR 4.00.

DCF Referrals to TANF Assistance: DCF social workers refer families to DTA for public benefits including TAFDC. The expenditures included in this MOE claim only include the portion of expenditure associated with the TAFDC eligible population. Regulations regarding TAFDC financial eligibility can be found at 106 CMR 704.010.

State Earned Income Tax Credit (SEITC): Administered by the Department of Revenue, SEITC is a refundable tax credit that is equal to 30 percent of the federal earned income tax credit claimed by the filer in the same tax year. This applies to those who meet the TAFDC-eligible requirements of 106 CMR 704.010.

Youth Works Youth Employment Program: Administered by the Executive Office of Workforce and Labor Development (EOLWD), Youth Works is a year-round employment program geared toward at-risk low-income youth. The program has made increasing efforts to serve dropouts and older youth to focus on serving the disconnected youth of the state. The expenditures included in this MOE claim only include the portion of expenditures associated with the TAFDC eligible population. Regulations regarding financial eligibility can be found at 106 CMR 704.010.

Department of Conservation and Recreation (DCR) Summer Jobs: Administered by DCR, summer employment for youth is aimed at serving underprivileged populations especially in economic development areas. The expenditures included in this MOE claim only include the portion of expenditures associated with the TAFDC eligible population. Regulations regarding financial eligibility can be found at 106 CMR 704.010.

b. Require a parent or caretaker receiving assistance to engage in work (defined by the State) once the State determines the parent or caretaker is ready to engage in work, or once he or she has received 24 months of assistance, whichever is earlier, consistent with the childcare exception at 407(e)(2) (section 402(a)(1)(A)(ii) of the Social Security Act)

Parents or caregivers receiving TAFDC are assessed for their ability to work or engage in an employment, education, or training program once their TAFDC case is approved. Parents or caregivers who have received assistance for 60 days must work 20 hours per week if the youngest child in the assistant unit is between the ages of 2 and 6 or 30 hours per week if the youngest child in the assistant unit is six or older. Exceptions to this are parents or caregivers who are exempt, caring for a foster child in the home who is under age 2, caring for a foster child in the home whose needs exceed a standard level of care as defined by the Massachusetts Department of Children and Families or who have good cause. TAFDC work program rules are found in regulation at 106 CMR 703.150.

When a parent or caregiver is not engaged in work or an approved activity after 60 days or stops participating in work or an approved activity without good cause, they are removed from the grant and the grant is reduced to the lower household size until the parent or caregiver

connects with the FEW and accepts a program referral. If the parent or caregiver continues not to participate the grant is terminated.

DTA continuously evaluates a family's readiness to participate in the work program at application, recertification, and every time a case manager engages with a parent or caregiver. FEWs engage with parents or caregivers and collaborate with employment service programs to identify and address challenges that may impact a parent or caregivers' ability to participate to prevent sanction, and to re-engage parents or caregivers as soon as possible when a sanction is in place.

c. Ensure that parents and caretakers receiving assistance engage in work in accordance with section 407 (section 402(a)(1)(A)(iii) of the Social Security Act)

In accordance with the *Massachusetts Workforce Innovation and Opportunity Act (WIOA) State Plan*, DTA works with the MassHire Department of Career Services (MDCS) and the Executive Office of Labor and Workforce Development (EOLWD) and other WIOA partner agencies to create dedicated partnerships that ensure parents and caregivers receiving TAFDC, who are often the individuals with the highest challenges to employment, are well served not just by DTA, but by all of the appropriate parts of the workforce development system.

The state's workforce development activities for parents and caretakers receiving TAFDC include the resources available through the Employment Services Program. The WIOA Steering Committee, policy makers and leadership at DTA regularly discuss the need to increase the available resources for education and training programs focused on career pathways that can help move the skill set of individuals receiving assistance into the range of employment that provides family-supporting wages. Successful strategies typically require multi-year education and training that leads to a credential along with family support (public assistance, childcare, transportation), coaching at the education and training provider, on-the-job experience (subsidized or internships) and intensive job placement (unsubsidized) support upon completion (potentially through the MassHire Career Centers).

Before a TAFDC case is approved, a case manager helps parents or caretakers who may be 'work ready' register with the MassHire system through MassHire JobQuest. Registering with JobQuest allows someone to create a job match profile that matches their skills and experience against current job openings. A resume can also be attached, and profiles can be made visible to hiring employers. This is a critical first step for parents and caregivers to be positioned for hire. Once a TAFDC case is approved, the family is referred to the FEW who completes a welcoming phone call, an orientation, and an assessment to help the family identify goals they

want to work on. The FEW then helps to connect the family to a program that can help them meet their identified goal. A referral for fully subsidized childcare is provided so that the parent or caretaker can participate in their chosen program. Young parents without a high school degree and not work ready participate in the Young Parents Program to achieve their high school equivalency degree.

DTA is also engaged in a partnership with the Massachusetts Rehabilitation Commission (MRC) to increase options for parents and caregivers who have a disability but want to engage in work. DTA has found that these partnerships are critical resources for families receiving TAFDC to not only gain additional skills but to receive the supports necessary to move from public assistance to employment.

FEWs maintain relationships with all of the ESP providers in their area. When a parent or caretaker stops participating in a program, the FEW and the program work collaboratively to re-engage the parent or caretaker in the activity quickly before there is any reduction to the family's grant.

Massachusetts also encourages work through the earned income disregards described above under employment incentives. These disregards allow families to maintain access to benefits when they begin working so they can access all of the supports needed to maintain employment. The disregards also allow families to build assets and gain job experience so that they are better positioned to stay off public benefits once their TAFDC case closes. While Massachusetts allows families to participate in activities that are appropriate for them and will help them meet their goals, Massachusetts only reports the activities and hours in the WPR as allowed under the Social Security Act and described in the Work Verification Plan.

d. Take such reasonable steps as the State deems necessary to restrict the use and disclosure of information about individuals and families receiving assistance under the program attributable to funds provided by the Federal Government (section 402(a)(1)(A)(iv) of the Social Security Act)

The State restricts the use/disclosure of confidential information. Current regulations regarding these restrictions can be found at Chapter 66 A of Massachusetts General Law: Fair Information Practices. Furthermore, Governor Patrick issued Executive Order 504 on September 19, 2008, which added additional safeguards regarding the security and confidentiality of personal information.

.e. Establish goals and take action to prevent and reduce out-of-wedlock pregnancies, with special emphasis on teenage pregnancies (section 402(a)(1)(A)(v) of the Social Security Act)

Massachusetts historically has had one of the lowest teen birth rates in the country. In 1996, there were 5,758 births in Massachusetts to women between the ages of 15 through 19, representing 28.5 per 1,000 females in that age range. In 2019 the birth rate for women between the ages of 15 and 19 was 6.9 births per 1,000 women. This represents the second lowest teen birth rate in the country for 2019.

To reduce the incidence of out-of-wedlock births, DTA works with the state Department of Public Health (DPH). DPH coordinates family planning and teen pregnancy prevention efforts throughout the Commonwealth. In addition, DPH works with local schools (K-12) to develop sex and health education curricula that incorporate pregnancy prevention efforts.

The Massachusetts Pregnant and Parenting Teen Initiative, administered by DPH, aims to increase life opportunities, and enhance family stability among young families. Participating families receive services tailored to their individual needs, including health and social service assessments, case management, counseling, health education, referrals, and infant/child services. Outcomes for this program include an increase in continuous contraceptive use, a decrease in unintended pregnancies and a reduction in reliance on public assistance.

.f. Conduct a program designed to reach State and local law enforcement officials, the education system, and relevant counseling services, that provides education and training on the problem of statutory rape so that teenage pregnancy prevention programs may be expanded to include men (section 402(a)(1)(A)(vi) of the Social Security Act)

The Governor's Council to Address Sexual and Domestic Violence (the Council) is an interdisciplinary council of approximately 30 members representing advocates, health care, the Attorney General's Office, law enforcement, the courts and higher education as well as various state agencies. The Council works to enact best practices to combat issues of sexual assault and domestic violence, in order to keep Massachusetts residents safe. The Council is committed to improving prevention efforts, enhancing support for those impacted by sexual assault and domestic violence, and to holding those who perpetrate sexual assault and domestic violence accountable. The full mission and scope of the Council can be found in Executive Order 563. DTA is represented on the Council by Crystal Jackson, Director of the DTA's Domestic Violence Unit.

Some initiatives of the Council that may prevent statutory rape are the Domestic Violence Toolkit and RESPECTfully. The Domestic Violence Toolkit provides local law enforcement with the tools to support survivors of domestic violence and to identify risk and re-assault factors. It

has been implemented in municipal police departments in over 65 cities and towns. RESPECTfully is a public awareness and prevention campaign to increase awareness about what constitutes a healthy relationship. The target audience for RESPECTfully is youth between the ages of 12 and 18 and those who serve or care for youth ages 12 through 18. Through Jane Doe, Inc., the Massachusetts White Ribbon Day Campaign promotes and encourages men and boys to be allies in the prevention of sexual and relationship violence.

In addition, the Department's Domestic Violence Unit, comprised of staff with expertise in domestic violence, is represented on the State's Roundtables on Domestic Violence and Sexual Assault, which operate through the state's District Attorneys and on local High-Risk Assessment Teams, which are comprised of public and domestic violence service providers, law enforcement, district attorneys' staff, probation staff, batterers' intervention programs and other stakeholders to better identify and respond to domestic violence cases that pose the highest risk of lethality.

DTA's Domestic Violence Specialists serve anyone who identifies as a survivor of domestic violence and/or sexual assault (including statutory rape), by developing safety plans and referring them to services in the community, including advocacy, counseling, shelter, and Legal Aid, as appropriate. The Domestic Violence Specialists also assist survivors with DTA benefits and housing options, if homeless.

g. Implement policies and procedures as necessary to prevent access to assistance provided under the State program funded under this part through any electronic fund transaction in an automated teller machine or point-of-sale device located in a place described in section 408(a)(12), including a plan to ensure that recipients of the assistance have adequate access to their cash assistance (section 402(a)(1)(A)(vii) of the Social Security Act)

The Commonwealth has enacted a state law to prohibit the use of cash assistance, including TAFDC, in electronic benefit transfer (EBT) transactions at liquor stores, casinos, gambling casinos or gaming establishments, and retail establishment which provides adult-oriented entertainment in which performers disrobe or perform in an unclothed state for entertainment, as well as other establishments not identified in Section 408(a)(12). Retailers face fines from \$500 for a first offense, \$500 to \$2500 for a second offense and not less than \$2500 for a third offense. See M.G.L. c. 18, § J. In addition, the Commonwealth has prohibited the use of cash assistance held on EBT cards to purchase alcoholic beverages, lottery tickets, gambling, adult oriented material or performances and other items and services. See M.G.L. c. 18, § I. Parents or caregivers who violate the purchasing provisions must pay the Commonwealth back for the

prohibited purchase. For a second offense, the parent or caregiver is disqualified from benefits for two months and must pay the Commonwealth back for the prohibited purchase. For a third offense, the parent or caregiver is disqualified from benefits permanently and must pay the Commonwealth back for the prohibited purchase.

Posters are displayed in all local offices informing families of the prohibited establishments and purchasing restrictions. The application for TAFDC benefits includes a penalty warning informing families of prohibited items and services as well as the penalties for violations. At application and redetermination, all families applying for or receiving TAFDC are provided a brochure that includes information on prohibited establishments, prohibited purchases and penalties. Retailers are notified about the law and its penalties. Local law enforcement agencies are notified about retailers who are found to have violated such law. In addition, the Department offers posters and training for retailers on the restrictions.

In an ongoing effort, the Department continues to work with its EBT vendor on blocking the use of EBT cards in prohibited establishments. The Department and its vendor are jointly researching potential prohibited establishments. The Commonwealth provides its EBT vendor with a final list of prohibited establishments monthly; the EBT vendor blocks the designated establishments' Point of Service (POS) device and ATMs on site.

.h. Ensure that recipients of assistance provided under the State program funded under this part have the ability to use or withdraw assistance with minimal fees or charges, including an opportunity to access assistance with no fee or charges, and are provided information on applicable fees and surcharges that apply to electronic fund transactions involving the assistance, and that such information is made publicly available (section 402(a)(1)(A)(viii) of the Social Security Act)

All TAFDC clients who receive benefits on an Electronic Benefit Transfer (EBT) card receive a brochure that advises clients about surcharge-free cash transactions and how to identify surcharge-free ATMs and POS devices. In addition, the brochure advises clients that they are entitled to two free ATM withdrawals in a calendar month, but that additional withdrawals are \$0.75 per transaction. This brochure, along with the EBT card itself, provide clients with a toll-free customer service line that is available 24-hours a day, 7-days a week regarding any questions they have about accessing their benefits.

The Department has also created an EBT cash withdrawal information sheet that is given to applicants and clients in all local offices. This information sheet identifies Massachusetts banks that provide EBT cash withdrawals without surcharges. The Department continues to pursue the expansion of its current surcharge-free options and the availability of low- and no-cost banking options.

In addition, the Commonwealth has partnered with a nonprofit, full-service credit-counseling agency, funded through a large banking institution's nonprofit foundation, to offer financial literacy and credit counseling workshops. These workshops are available to clients at no cost, statewide, to assist in their development of short and long-term financial planning. The workshop curriculum encompasses how clients reduce or eliminate fees associated with using their EBT cards or otherwise utilize their TAFDC benefits through direct deposit or direct vendor payments for rent, utilities, etc. While clients are instructed on how to better budget their TAFDC funds, they are also reminded of the prohibited items, services, and establishments, identified under State law and the associated penalties.

i. Indicate whether it intends to treat families moving from another State differently from other families under the program, and if so how (section 402(a)(1)(B)(i) of the Social Security Act)

Families moving into Massachusetts from other states receive the same benefits from the TAFDC program as current residents.

j. Indicate whether it intends to provide assistance to non-citizens, and if so, include an overview of the assistance (section 402(a)(1)(B)(ii) of the Social Security Act)

Massachusetts provides assistance to U.S. citizens, nationals and certain qualified aliens pursuant to federal law. Provided they meet other TAFDC program eligibility criteria, Massachusetts provides TAFDC assistance to qualified immigrants who entered the United States prior to August 22, 1996; qualified immigrants who entered the United States on or after August 22, 1996, who have been in a qualified immigration status for five years; and qualified immigrants who entered the United States on or after August 22, 1996, who are exempt from the five-year bar. Those who are exempt from the five-year bar include asylees, refugees, parolees, certain battered non-citizens, victims of severe forms of trafficking, those whose deportation is being withheld, Amerasians, Cuban and Haitian entrants, Veterans, certain Veterans, and members of the military on active duty and their spouses and unmarried dependent children. The regulations regarding eligibility of immigrants can be found at 106 CMR 703.430.

k. Set forth objective criteria for the delivery of benefits and the determination of eligibility and for fair and equitable treatment, including an explanation of how it will provide opportunities for recipients who have been adversely affected to be heard in a State administrative or appeal process (section 402(a)(1)(B)(iii) of the Social Security Act)

Massachusetts will continue to operate the TAFDC program based on objective criteria for determination of eligibility and delivery of benefits according to program rules and procedures. All DTA activities are conducted in accordance with Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, as amended, the Americans with Disabilities Act of 1990, as amended, the Age Discrimination Act of 1975, as amended, and the Massachusetts Constitution. DTA does not discriminate on the basis of race, color, national origin, age, disability, religion, political beliefs, sexual orientation, gender, gender identity or expression, creed, ancestry, or Veteran's status, in admission or access to, or treatment or employment in its programs or activities.

Massachusetts will continue its current fair hearings process under 106 CMR 343.00 which provides an opportunity for a hearing before a hearings officer appointed by the Division of Hearings (DOH). The DOH is wholly separate and independent from all other offices and divisions of DTA and from all other personnel of DTA. An applicant/recipient has a right to a fair hearing as set forth in the Department's regulations at 106 CMR 343.000.

(a)(1)(B)(v) Not later than 1 year after the date of enactment of this Act, unless the chief executive officer of the State opts out of this provision by notifying the Secretary, a State shall, consistent with the exception provided in section 407(e)(2), require a parent or caretaker receiving assistance under the program who, after receiving such assistance for 2 months is not exempt from work requirements and is not engaged in work, as determined under section 407(c), to participate in community service employment, with minimum hours per week and tasks to be determined by the State.

Massachusetts will continue to operate the program under current policy and rules, as indicated in this *State Plan* renewal. If a parent or caretaker is not exempt from the work program requirement as defined by the State, and has received assistance for sixty days, and is not working or substituting work hours with education or training, they are required to participate in community service for the maximum number of hours allowed under the Fair Labor Standards Act, for the hours per week that ensures compliance with 106 CMR 703.150.

(a)(1)(B)(v) The document shall indicate whether the State intends to assist individuals to train for, seek, and maintain employment (I) providing direct care in a long-term care facility (as such terms are defined under section 1397j of this title); or (II) in other occupations related to elder care determined appropriate by the state for which the State identifies an unmet need for service personnel, and, if so, shall include an overview of such assistance.

Massachusetts does not intend to exercise the above options currently.

TANF Certifications

TANF CERTIFICATIONS

States that include TANF in the *Combined State Plan* must provide a certification by the chief executive officer of that State, that during the fiscal year, the State will:

1. Operate a child support enforcement program under the *State Plan* approved under part D. (section 402(a)(2) of the Social Security Act);

Yes, administered by DOR

2. Operate a foster care and adoption assistance program under the *State Plan* approved under part E, and that the State will take such actions as are necessary to ensure that children receiving assistance under such part are eligible for medical assistance under the *State Plan* under title XIX. (section 402(a)(3) of the Social Security Act);

Yes, administered by DCF

3. Specify which State agency or agencies will administer and supervise the program referred to in paragraph (1) for the fiscal year, which shall include assurances that local governments and private sector organizations (section 402(a)(4) of the Social Security Act)-
(A) have been consulted regarding the plan and design of welfare services in the State so that services are provided in a manner appropriate to local populations; and
(B) have had at least 45 days to submit comments on the plan and the design of such services;

Yes, administered by DTA

4. Provide each member of an Indian tribe, who is domiciled in the State and is not eligible for assistance under a tribal family assistance plan approved under section 412, with equitable access to assistance under the State program funded under this part attributable to funds provided by the Federal Government (section 402(a)(5) of the Social Security Act);

Yes, administered by DTA

5. Establish and enforce standards and procedures to ensure against program fraud and abuse, including standards and procedures concerning nepotism, conflicts of interest among individuals responsible for the administration and supervision of the State program, kickbacks, and the use of political patronage. (section 402(a)(6) of the Social Security Act);

Yes, administered by DTA

6. (optional) Establish and Enforcing standards and procedures to (section 402(a)(7) of the Social Security Act).-

- (i) screen and identify individuals receiving assistance under this part with a history of domestic violence while maintaining the confidentiality of such individuals;
- (i) refer such individuals to counseling and supportive services; and
- (ii) waive, pursuant to a determination of good cause, other program requirements such as time limits (for so long as necessary) for individuals receiving assistance, residency requirements, child support cooperation requirements, and family cap provisions, in cases where compliance with such requirements would make it more difficult for individuals receiving assistance under this part to escape domestic violence or unfairly penalize such individuals who are or have been victimized by such violence, or individuals who are at risk of further domestic violence.

Yes, administered by DTA. Options available to current and potential beneficiaries can be found at 106 CMR 703.110. Case workers and all other agency personnel are provided with training regarding relevant state standards and procedures.

7. Establish and enforce standards and procedures to ensure that applicants and potential applicants for TANF are notified of assistance made available by the state to victims of sexual harassment and survivors of domestic violence, sexual assault, or stalking.

Yes, administered by DTA

8. Ensure that case workers and other agency personnel responsible for administering the TANF program are trained in: the nature and dynamics of sexual harassment and domestic violence, sexual assault, and stalking; state standards and procedures relating to the prevention of, and assistance for, individuals who are victims of sexual harassment or survivors of domestic violence, sexual assault, or stalking; and methods of ascertaining and ensuring the confidentiality of personal information and documentation related to applicants for assistance and their children who have provided notice about their experiences of sexual harassment, domestic violence, sexual assault, or stalking.

Yes, administered by DTA

SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM

(a) General Requirements 27: The State agency must prepare and submit an Employment and Training (E&T) Plan to its appropriate Food and Nutrition Service (FNS) Regional Office. The E&T Plan must be available for public inspection at the State agency headquarters. A State agency may include its plan for the SNAP E&T program in a Combined Plan under WIOA but will require FNS approval prior to implementation and must continue to make a copy of the plan available for public inspection. If a State includes SNAP E&T in a Combined Plan under WIOA, the State agency will detail the following for each year covered by the Combined Plan:

(1) The nature of the E&T components the State agency plans to offer and the reasons for such components, including cost information. The methodology for State agency reimbursement for education components must be specifically addressed;

The mission of the Massachusetts Department of Transitional Assistance (DTA) is to assist and empower low-income individuals and families to meet their basic needs, improve their quality of life, and achieve long-term economic self-sufficiency. Located within the Executive Office of Health and Human Services, the Department ensures that the emergency and transitional needs of the individuals and families of the Commonwealth are met through a combination of federal- and state-funded programs.

DTA is the single state agency responsible for administering the Supplemental Nutrition Assistance Program (SNAP) in Massachusetts. As the designated SNAP agency, DTA manages the State's SNAP Employment and Training (E&T) Program, SNAP Path to Work. The program operates statewide in 14 counties served by 20 DTA Local Offices and via 48 self-service kiosks located within partner organizations. SNAP clients not participating in the State's Temporary Assistance for Needy Families (TANF) work program can access important employment services and work supports through the program.

Since 2006, DTA has partnered with ForHealth Consulting of the University of Massachusetts Chan Medical School (UMass Chan) to offer under and unemployed SNAP-only participants meaningful opportunities to enhance employability through SNAP Path to Work participation. UMass Chan assists DTA by recruiting, subcontracting with and monitoring SNAP Path to Work providers, with the design and production of SNAP Path to Work promotional material and the design and maintenance of snappathtowork.org. UMass Chan also assists SNAP Path to Work providers with claiming reimbursement for services rendered under the SNAP E&T reimbursement project.

Contracted providers receive partial federal reimbursement of incurred costs related to serving eligible participants as approved by the Food and Nutrition Service (FNS) via DTA's annual *SNAP E&T State Plan*. DTA monitors the successful operation of this program in coordination with UMass Chan.

As of October 1, 2023, forty contracted SNAP Path to Work providers and the statewide network of MassHire Career Centers located across the state have the capacity to help as many as 3654 (duplicate count) low-income individuals gain valuable skills and increase employability through engagement in one or more of the following programs:

Non-Education, Non-Work Components

Supervised Job Search

To be approved to deliver supervised job search under the SNAP Path to Work umbrella (as an approved location) an organization must demonstrate that the criteria below will be met and that program participants are likely to find a job through the activity.

Supervised job search activity:

- is delivered through SNAP Path to Work Provider organizations but may be conducted remotely, in-person or via hybrid model
- participants must have access to the tools and materials to perform a successful supervised job search, including but not limited to, access to computers and internet service, transportation support or virtual tools such as websites, portals, or web applications to access supervised job search services
- may be conducted independently or within a group setting
- must be supervised and tracked, either remotely or in-person, by an individual who has the necessary knowledge and skills to guide and support the participant through a successful job search
- Supervision can occur synchronously or asynchronously with respect to the participant's job search activities; and
- must include at least monthly check-ins.

DTA does not prescribe the specific method that providers must use to supervise and track client hours. Some providers have manual attendance records while others have participation tracking software. Providers report participation hours to DTA monthly.

Job search assistance is also included as part of many SNAP Path to Work vocational skills training programs and is available to statewide via WPP through MassHire Career Centers.

An estimated 281 work ready, job seeking participants will engage in this component in FFY 2024.

FFY 2024 component cost: \$336,111.68

Job Readiness (Job Search Training)

Job Readiness activity strives to enhance the job readiness of participants by providing instruction in job seeking techniques and increasing motivation and self-confidence. This may include direct training or support activities such as skill assessments, training in techniques for employability, counseling, information on available jobs, occupational exploration, including information on local emerging and in demand occupations, mock interviews, job fairs, life skills, guidance, and motivation for development of positive work behaviors necessary for the labor market, or job placement services. Participants learn behaviors associated with job seeking success (e.g., Identification of skills/interests, obtaining interviews, updating resumes, and developing good work habits).

To improve access to job readiness, job search and training opportunities for DTA clients, the Department has partnered with the Executive Office of Labor and Workforce Development (EOLWD) and the MassHire Department of Career Services (MDCS) to develop and implement the Work Participant Program (WPP) program.

DTA clients (both SNAP and TANF recipients) can access WPP through a MassHire Career Center (MCC) or by way of a referral from DTA. Participating clients will have an initial assessment and create a Career Development plan with a case manager, who will review the individualized and group services available through the career center depending on location. Services may include job readiness activities, such as resume and cover letter writing, interviewing skills, job search techniques and developing a professional network, or participation in employer recruitment events and self-directed job search. WPP participants will also have the opportunity to apply for WIOA funded training vouchers if it is determined they need further skills to enter or return to the workforce.

Until 2020, the WPP program was not supported by SNAP E&T funds. SNAP client WPP participation is now partially supported by SNAP E&T funding, increasing WPP capacity and SNAP client access to job focused education and training activity and job search support. This relationship also allows eligible WPP participants to access SNAP E&T transportation, SNAP childcare, and job retention support. Job search training is offered statewide and is also included as part of many SNAP Path to Work vocational skills training programs. An estimated 1357 job seeking participants will engage in this component in FFY 2024.

FFY 2024 component cost: \$2,808,015.07

Job Retention

Job Retention services are offered statewide and include regular face to face and/or telephonic check ins with the working participant. Based on client needs, retention services may include regular in-person and/or virtual check ins with the working client and may include employer consultation, job coaching and supports and typically transportation assistance.

To qualify for job retention services under the SNAP Path to Work umbrella, the participant must have:

- secured employment after or during SNAP E&T participation; and
- received SNAP in the month of or the month prior to enrolling in Job Retention services.

Once enrollment criteria have been met, Job Retention services are allowable for a period of at least 30 and up to 90 days, regardless of the participant's current SNAP status. Participation hours vary.

An estimated 406 participants will engage in this component in FFY 2024.

FFY 2024 component cost: \$184,419.82

Education Components

Basic/Foundational Skills Instruction (including HiSet/GED)

Basic/Foundational Skills Instruction provides educational programs or activities that improve basic skills or otherwise improve employability or employment advancement potential.

High school equivalency preparation classes prepare participants to take the HiSET/GED test, either taken directly through the provider or through an approved third-party source. Most providers offering this component will allow the client to take the test multiple times until passing.

Since there is not a nationally recognized certificate or diploma for receiving Adult Basic Education (ABE) services, participants typically receive acknowledgement of level acquisition, certificates of completion and access to job opportunities. Progress is monitored using the Test of Adult Basic Education (TABE) and other testing.

With improved basic skills, many participants will move on to other SNAP E&T programs and/or higher education upon completion. Most of these programs also include elements of job readiness as the development of skills is focused on improving workforce opportunities.

State education funds do not cover all secondary and post-secondary education and training programs. SNAP E&T funds are not used to supplant existing educational services. SNAP E&T funds are not used for costs that exceed the normal costs of service provided to persons not participating in the SNAP E&T program or to support training that is normally available to the public at no cost.

An estimated 134 voluntary participants will engage this component in FFY 2024.

FFY 2020 component cost: \$727,637.78

English Language Acquisition

As they are independently operated by eight SNAP Path to Work providers, SNAP Path to Work's English Language Acquisition programs vary in duration and focus depending on the immediate goal of the participant. For example, some focus on refugees with an immediate need for basic English skills and cultural competencies that will allow them to secure employment quickly. Several are comprised of different levels with attainable and reasonable goals for the client to complete in the time allotted based on their skill level. While a diploma or certificate may not always be attained upon completion of intermediate level EPEL classes, client progress can be measured through advancement from level to level. Most programs focus on English language for the workplace and the language skills needed to advance out of entry-level positions or combine EPEL and skills training, allowing the client to market themselves as a multi-lingual worker with the required job skills.

State education funds do not cover all secondary and post-secondary education and training programs. SNAP E&T funds are not used to supplant existing educational services. SNAP E&T funds are not used for costs that exceed the normal costs of service provided to persons not participating in the SNAP E&T program or to support training that is normally available to the public at no cost.

An estimated 378 SNAP participants will engage this component in FFY 2024.

FFY 2024 component cost: \$1,930,254.04

Integrated Education and Training (IET)/Bridge Programs

In FFY 2024 one community college and one community-based organization will offer college transition programs designed to equip adult learners with the academic, college-going and life skills necessary to enter college and complete a post-secondary degree or certificate program and establish a career path.

This service is offered to participants living in Bedford, Boston, Lowell, and surrounding areas.

An estimated 35 non-traditional adult learners will engage this component in FFY 2024.

FFY 2024 component cost: \$256,490.89

Vocational Skills Training

Vocational Skills Training programs aim to improve the employability of participants by providing academic and technical knowledge and skills needed to move into subsequent education or training or directly into employment. 52% of the programs to be offered under the SNAP Path to Work umbrella in FFY 2024 are Career/Technical Education Programs or other Vocational Training

A variety of occupational, remedial, and entry-level job skills training, customized training, institutional skills training; upgrade training, and vocational education programs are available through the SNAP Path to Work network of providers.

The sixty-nine individual Vocational Skills Training programs to be offered through the SNAP Path to Work program in FFY 2024 are operationally independent and vary in duration.

Vocational Skills training participants will prepare for a variety of careers, in fields including but not limited to, Pharmacy Technician, Certified Nursing Assistant, Personnel Care Attendant, Phlebotomy, Culinary Arts, Biotechnology, Culinary Arts, Hospitality, Medical Administration, Construction and Skilled Trades, Veterinary Assistant, Information Technologies, and Medical Interpreting. Most programs result in a certification or license. For fields for which there is no specific industry recognized certification, supporting certifications are provided so that a client is fully prepared to apply for the position—e.g., CPR/First Aid for Early Childhood careers, ServSafe for culinary careers and OSHA certifications for Skilled Trade and Construction. Some programs also provide the opportunity for participants to earn college credits that can be applied if the participant elects to pursue a degree in the future. All providers assist with finding jobs at the completion of the program via either job search and/or job search training, referrals

to MassHire Career Centers or other training providers, community partnerships, internships, apprenticeships and/or job placement. Skills trainings programs typically include at least some job readiness and preparation for applications through a formal secondary program or built into the skills training program itself.

State education funds do not cover all secondary and post-secondary education and training programs. SNAP E&T funds are not used to supplant existing educational services. SNAP E&T funds are not used for costs that exceed the normal costs of service provided to persons not participating in the SNAP E&T program or to support training that is normally available to the public at no cost.

Because SNAP Path to work providers are independently operated, target varied populations and are in different labor market areas, participation criteria is not standardized across programs.

An estimated 1160 voluntary participants with varying needs and employment goals will engage in this component in FFY 2024.

FFY 2024 component cost: \$7,448,224.5

Work Readiness Training

Work readiness training activities are designed to improve basic skills and the employability of SNAP participants through general skills building, the development of good work habits, and building a work history. Work readiness programs may also offer SNAP participants an opportunity to earn credentials valued by employers and industry, including certificates, industry-recognized credentials, and licensures.

Because SNAP Path to work providers is independently operated, target varied populations and are in different labor market areas, participation criteria is not standardized across programs.

An estimated 496 voluntary participants with varying needs and employment goals will engage in this component in FFY 2024.

FFY 2024 component cost: \$1,689,620.43

Work Experience

Internship

Internship under the SNAP Path to Work umbrella is a planned, structured learning experience that takes place in a workplace for a limited period. Internships help the participant gain the competencies and experience to meet local employer demands. Internships must be related to a career choice or career exploration and provide learning through work-based projects. The program may be paid or unpaid and must:

- not provide any work that has the effect of replacing the employment of an individual not participating in the employment or training experience program; and
- provide the same benefits and working conditions that are provided at the job site to employees performing comparable work for comparable hours.

Unsubsidized Internship:

Participant wages and training stipends are not supported by SNAP E&T funds.

An estimated 70 voluntary participants who are motivated to work will engage in unsubsidized internship in FFY 2024.

FFY 2024 component cost: \$186,375.31

Subsidized Internship:

The wages of participants are paid by providers using E&T reimbursement eligible funding (such as corporate grants) and subsidized via the 50% federal SNAP E&T reimbursement.

An estimated 22 voluntary participants who are motivated to work will engage in subsidized internship in FFY 2024 for up to 3 months.

FFY 2024 component cost: \$323,209.60

Pre-Apprenticeship

Pre-apprenticeship programs are designed to prepare individuals to enter and succeed in an apprenticeship program.

The program may be paid or unpaid. Participant wages and training stipends are not supported by SNAP E&T funds.

An estimated 15 voluntary participants who are motivated to work but lack the practical and technical skills required for a skilled occupation will engage in this component in FFY 2024.

FFY 2024 component cost: \$66,351.60

Apprenticeship

Apprenticeship under the SNAP Path to Work umbrella combines on-the-job training with related instruction that enables participants to master the practical and technical skills required for a skilled occupation.

Unsubsidized Apprenticeship:

The wages of participants and training stipends are not subsidized via the federal SNAP E&T reimbursement.

An estimated 12 voluntary participants who are motivated to work but lack the practical and technical skills required for a skilled occupation will engage in this component in FFY 2024.

FFY 2024 component cost: \$65,052.66

Subsidized Apprenticeship:

The wages of participants are paid by providers using E&T reimbursement eligible funding (such as corporate grants) and subsidized via the 50% federal SNAP E&T reimbursement.

An estimated 3 voluntary participants who are motivated to work but lack the practical and technical skills required for a skilled occupation will engage in this component for up to 2 months in FFY 2024.

FFY 2024 component cost: \$41,649.85

Transitional Jobs

A transitional job is one that provides a time-limited, paid work experience in the public, private or non-profit sectors. These jobs are designed to enable an individual to establish a work history, demonstrate work success in an employee-employer relationship, and develop the skills that lead to successful unsubsidized employment.

Unsubsidized Transitional Jobs:

Participant wages and training stipends are not supported by SNAP E&T funds.

An estimated 41 voluntary participants who lack the work history and work habits needed to maintain unsupported employment will engage in this component in FFY 2024.

FFY 2024 component cost: \$405,974.98

Subsidized Transitional Jobs:

The wages of participants are paid by providers using E&T reimbursement eligible funding (such as corporate grants) and subsidized via the 50% federal SNAP E&T reimbursement.

An estimated 90 voluntary participants who lack the work history and work habits needed to maintain unsupported employment will engage in this component for up to 6 months in FFY 2024.

FFY 2024 component cost: \$756,568.12

Note: Case Management services accompany all SNAP Path to Work program activity. SNAP participant hours in all SNAP Path to Work program activity are tracked/logged by contracted E&T Provider staff.

(2) An operating budget for the Federal fiscal year with an estimate of the cost of operation for each Federal fiscal year covered by the Combined Plan. Any State agency that requests 50 percent Federal reimbursement for State agency E&T administrative costs, other than for participant reimbursements, must include in its plan, or amendments to its plan, an itemized list of all activities and costs for which those Federal funds will be claimed,

including the costs for case management and casework to facilitate the transition from economic dependency to self-sufficiency through work. Costs in excess of the Federal grant will be allowed only with the prior approval of FNS and must be adequately documented to assure that they are necessary, reasonable and properly allocated. A State must submit a plan amendment to request budget adjustments at least 30 days prior to planned implementation;

As of October 27, 2023, Massachusetts' FFY 2024 SNAP E&T plan is federally funded as follows:

Massachusetts' FFY 2024 SNAP E&T Plan

E&T 100% Grant	\$2,615,371.00
ABAWD Pledge Funds	\$0.00
Additional E&T Administrative Expenditures (federally-reimbursed 50% of incurred costs)	
50 Percent Federal	\$5,245,288.65
50 Percent Federal (pending)	\$3,042,821.12
Participant Supports for Transportation and Other (federally-reimbursed 50% of incurred costs)	
50 Percent Federal	\$294,900.35
50 Percent Federal (pending)	\$0.00
Participant Supports for Dependent Care (federally reimbursed 50% of incurred costs)	
50 Percent Federal	\$3,200.00
50 Percent Federal (pending)	\$0.00
Total Approved Federal 50% Reimbursement	\$5,543,389.00
Total Pending Federal 50% Reimbursement	\$3,042,821.12
Total Planned FFY 2024 Costs	\$19,787,791.24

(3) The categories and types of individuals the State agency intends to exempt from E&T participation, the estimated percentage of work registrants the State agency plans to exempt, and the frequency with which the State agency plans to reevaluate the validity of its exemptions;

SNAP Path to Work is a voluntary program that serves all eligible SNAP participants throughout the state in partnership with UMass Chan Medical School and contracted SNAP Path to Work providers. Regardless of if they are subject to SNAP work requirements described in CMR 362.300-362.340, DTA clients are not penalized for failure to participate in the SNAP Path to Work Program.

(4) The characteristics of the population the State agency intends to place in E&T;

All SNAP applicants and recipients (including those whose SNAP is active at \$0) who do not also receive TAFDC and who can work following job focused education or training, job readiness, job

search assistance and/or work experience participation may voluntarily participate in the SNAP Path to Work program.

SNAP clients who are subject to work rules for Able Bodied Adults without Dependents (ABAWDs) will have the opportunity to meet the ABAWD Work Program requirement by participating in qualifying programs offered through the SNAP Path to Work program, as well as comparable community-based education and training programs, including WIOA job search, education and training activity, or self-initiated workfare placements. ABAWD participation in education and training programs offered outside of the SNAP Path to Work program are not supported by SNAP E&T funds.

SNAP E&T Providers perform a comprehensive assessment of each interested SNAP participant using educational, skills, and career assessment tools to determine appropriateness for the particular E&T component and service needs. The assessment includes occupational interests, vocational skills and aptitudes, educational attainment levels, English proficiency; basic literacy skills, prior work experience, barriers to employment, and need for support services.

Assessment tools include but are not limited to: TABE Tests, HiSET, Pre-test, ESL Placement Test, Testing of Applied Mathematics, SOLOM (Student Oral Language Observation Matrix), Skills Inventory and Myers-Briggs.

Completed assessment results are shared with DTA Central Office SNAP E&T staff via DTA's online Partner Activity Tracking Hub (PATH system). After review of the assessment information and the activity plan, eligible SNAP participants are approved for SNAP Path to Work participation.

Assessment costs are included in the costs of training program components.

(5) The estimated number of volunteers the State agency expects to place in E&T;

As of October 1, 2023, forty contracted SNAP Path to Work providers and MassHire Career centers located across the state have the capacity to help as many as 3654 (duplicate count) low-income individuals gain valuable skills and increase employability through engagement in SNAP Path to Work program activity.

(6) The geographic areas covered and not covered by the E&T Plan and why, and the type and location of services to be offered;

SNAP Path to Work programming is offered statewide. That said, there are parts of the state where there is little to no activity outside of the WPP program (for example, parts of Western Massachusetts and the Cape Cod areas). DTA will continue provider recruitment efforts, targeting community colleges statewide and additional community-based organizations (CBOs) in these E&T desert areas. New providers will be invited to begin participating in the program as is monetarily and programmatically feasible.

(7) The method the State agency uses to count all work registrants as of the first day of the new fiscal year;

DTA is required to establish the number of work registrants (or those subject to General SNAP Work Rules) on the SNAP caseload on October 1st of each year. The work registrant count is extracted from DTA's BEACON eligibility system data base based on individual SNAP recipient coding.

(8) The method the State agency uses to report work registrant information on the quarterly Form FNS-583;

27 CFR § 273.7(c)(6).

To determine the unduplicated count of new work registrants in Massachusetts during the federal fiscal year:

1. The total number of work registrants on the first day of the federal fiscal year are identified by:
 - determining the total population of SNAP participants (applicants and recipients) between the ages of 16 and 59 (including 16 and 59), excluding those who meets exemption criteria identified at 7 CFR 273.7(b)(1).
2. On the last day of each month thereafter the total number of new work registrants for the month is determined by:
 - determining the total population of SNAP participants (applicants and recipients) between the ages of 16 and 59 (including 16 and 59), excluding those who meets exemption criteria identified at 7 CFR 273.7(b)(1); and
 - comparing to the resulting list to the previous lists for the fiscal year, filtering out anyone who appeared previously, to ensure that individuals who register more than once during the program year are counted only once.

DTA provides an unduplicated count of new SNAP work registrants on the FNS-583 Quarterly Program Activity Report form.

(9) The method the State agency uses to prevent work registrants from being counted twice within a Federal fiscal year. If the State agency universally work registers all SNAP applicants, this method must specify how the State agency excludes those exempt from work registration under 7 C.F.R. §273.7(b)(1). If the State agency work registers nonexempt participants whenever a new application is submitted, this method must also specify how the State agency excludes those participants who may have already been registered within the past 12 months as specified under 7 C.F.R. §273.7(a)(1)(i);

Methodology has been described in response to the previous question.

(10) The organizational relationship between the units responsible for certification and the units operating the E&T components, including units of the Statewide workforce development system, if available. FNS is specifically concerned that the lines of communication be efficient and that noncompliance by the participant be reported to the certification unit within 10 working days after the noncompliance occurs;

All SNAP certification activity is conducted by First Available Worker (FAW) SNAP case managers.

The Central Office SNAP Employment and Training Unit is made up of SNAP E&T management and four SNAP E&T Specialists, supported by one SNAP case manager who conducts eligibility work as needed. SNAP E&T Specialists, supported by local office Full Engagement Workers (FEWS) answer client and FAW questions about E&T program participation and refer participants to SNAP Path to Work providers for training. SNAP E&T Specialists also serve as the primary DTA contacts for and provide support to contracted SNAP Path to Work providers.

As Massachusetts operates a voluntary SNAP E&T program, there are no penalties for failing to participate in the SNAP Path to Work program. However, SNAP recipients who are subject to and choose to meet the ABAWD Work Program Requirement through program participation may become ineligible for SNAP if they fail to meet the work rules for any three months in a three-year period.

When a SNAP E&T Specialist approves SNAP Path to Work program enrollment for a person subject to the ABAWD rules, s/he records their participation within DTA's BEACON eligibility system and indicates whether the planned activity meets the ABAWD requirement. Each month, BEACON automatically assigns "Strikes" and ineligibility status (if applicable) to those subject to the rules who are not known to be meeting via hours worked, E&T participation, or verified workfare (volunteer) hours.

SNAP Path to Work providers report the participation status and hours of enrolled clients to DTA monthly. When the participation hours of a participant who is subject to the ABAWD rules fall below 20 hours per week, a Strike is applied unless the provider or the client has reported good cause.

(11) The relationship between the State agency and other organizations it plans to coordinate with for the provision of services, including organizations in the Statewide workforce development system, if available. Copies of contracts must be available for inspection;

DTA maintains an Interdepartmental Service Agreements (ISA) with UMASS Chan Medical School, who assists DTA with the administration of the SNAP E&T program, providing technical assistance, recruiting new providers, maintaining snappathtowork.org, and subcontracting with most SNAP Path to Work providers. UMASS provides technical support and assists providers

with claims for partial federal reimbursement of incurred costs and monitors provider compliance with federal and state E&T requirements.

DTA also maintains an ISA with the MassHire Department of Career Services, through which WPP services are funded and administered to eligible SNAP participants via the statewide MassHire Career Center network.

(12) The availability, if appropriate, of E&T programs for Indians living on reservations after the State agency has consulted in good faith with appropriate tribal organizations;

There are two federally recognized tribal organizations in Massachusetts, the Mashpee Wampanoag Tribe (also known as the People of the First Light) and the Wampanoag Tribe of Gay Head (Aquinnah) of Massachusetts.

DTA has consulted with federally recognized tribal organizations in Massachusetts regarding the availability of free Employment and Training (E&T) opportunities and supports through DTA's SNAP Path to Work program. As consultation occurs at least annually, this conversation is generally a reminder about the E&T services that are available to tribal members (on and off reservations) who receive SNAP through the SNAP Path to Work program, the supports available to SNAP Path to Work participants, and how to use the program website to stay abreast of current program offerings.

(13) If a conciliation process is planned, the procedures that will be used when an individual fails to comply with an E&T program requirement. Include the length of the conciliation period; and

N/A

(14) The payment rates for childcare established in accordance with the Childcare and Development Block Grant provisions of 45 CFR 98.43 and based on local market rate surveys.

N/A

(15) The combined (Federal/State) State agency reimbursement rate for transportation costs and other expenses reasonably necessary and directly related to participation incurred by E&T participants. If the State agency proposes to provide different reimbursement amounts to account for varying levels of expenses, for instance for greater or lesser costs of transportation in different areas of the State, it must include them here.

SNAP Path to Work participation is supported on an as needed basis by provision of participant supports (participant reimbursement) including:

- Transportation;

- Dependent Care;
- Educational/Credential Test and Licensing Fees;
- Drug Testing and Medical Services;
- Technology;
- Clothing/Uniforms;
- Books and Supplies; and
- Other allowable participant supports.

The amount budgeted for participant supports as part of the *FFY 2024 SNAP E&T State Plan* does not reflect all supports that SNAP Path to Work participants may receive. Supports that are paid for using funds that do not qualify for federal SNAP E&T reimbursement are not reflected, such as:

- Massachusetts Department of Early Education and Care (EEC) administered childcare subsidies funded by TANF monies and the Child Care Development Fund
- Transportation assistance that may be provided to certain E&T participants through the MBTA Youth Pass Program; and
- Federally funded provider issued supports.

Additionally, many providers offer benefits that might qualify as supports under other circumstances but issue these benefits to all program participants (included in their standard cost of program operation). For example, if test fees are included in the standard tuition, regardless of SNAP status or individually identified need, this assistance would not be considered an E&T reimbursement but an administrative cost. SNAP Path to Work providers are only required to budget for and track support costs separate from general program costs when issued on a case-by-case basis to remove barriers to participation.

While only 22% of contracted SNAP Path to Work providers administer SNAP E&T funded program supports, another 66% report that they provide one or more program supports for which they do not request SNAP E&T reimbursement (such as transportation, clothing, books and supplies, educational/credential test and licensing fees that are classified as general program costs or are not supported by SNAP E&T funding).

100% of SNAP Path to work participants may access DTA issued transportation support as needed and/or free childcare in the form of an EEC childcare voucher.

SNAP Path to Work Providers may request State funded transportation supports on behalf of SNAP Path to Work participants who need it. Contracted providers assess each participant's need and record the request within the Partner Activity Tracking Hub (PATH system). Approved transportation supports requested on behalf of eligible program participants are made available to participants via the household's EBT card and are based on the county in which the

participant lives (ranging from \$90 to \$149 per month, as determined by the average cost of transportation for each county).

The state will continue to explore ways in which we might fund additional supports and to connect E&T participants with existing barrier removing supports that are available outside of the SNAP Path to Work program.

(16) Information about expenses the State agency proposes to reimburse. FNS must be afforded the opportunity to review and comment on the proposed reimbursements before they are implemented.

The participant supports described above have been approved by FNS as part of the *FFY 2024 SNAP E&T State Plan*.

(b) Able-bodied Adults without Dependents (ABAWD)28: A State agency interested in receiving additional funding for serving able-bodied adults without dependents (ABAWDs) subject to the 3-month time limit, in accordance with 7 C.F.R. §273.7(d)(3), must include the following for each Federal fiscal year covered by the Combined Plan under WIOA:

(1) Its pledge to offer a qualifying activity to all at-risk ABAWD applicants and recipients;

N/A. Massachusetts does not qualify for Pledge funds as there were no at risk ABAWDs in the state at the start of FFY2024 due the suspension of the ABAWD rules due the PHE.

(2) Estimated costs of fulfilling its pledge;

N/A

(3) A description of management controls in place to meet pledge requirements;

N/A

(4) A discussion of its capacity and ability to serve at-risk ABAWDs;

N/A

Information about the size and special needs of its ABAWD population; and

N/A

(5) Information about the education, training, and workfare components it will offer to meet the ABAWD work requirement.

N/A

(c) Optional Workfare²⁹: State agencies or other political subdivisions must describe in detail in the plan how the political subdivision, working with the State agency and any other cooperating agencies that may be involved in the program, will fulfill the provisions of 7 C.F.R. §273.7(m). If a State opts to operate an optional workfare program or modify an existing optional workfare program, through a Combined Plan under WIOA, it must provide the following: (1) State agencies or political subdivisions submitting a workfare plan must submit with the plan an operating budget covering the period from the initiation of the workfare program's implementation schedule to the close of the Federal fiscal year for each year covered by the Combined Plan. In addition, an estimate of the cost for one full year of operation must be submitted together with the workfare plan for each Federal fiscal year covered by the Combined Plan.

N/A. Massachusetts operates a comparable workfare program.

(2) If workfare plans are submitted by more than one political subdivision, each representing the same population (such as a city within a county), FNS will determine which political subdivision will have its plan approved. Under no circumstances will a SNAP recipient be subject to more than one SNAP workfare program. If a political subdivision chooses to operate a workfare program and represents a population which is already, at least in part, subject to a SNAP workfare program administered by another political subdivision, it must establish in its workfare plan how SNAP recipients will not be subject to more than one SNAP workfare program.

29 7 CFR § 273.7(m)

30 7 CFR § 273.7(m)(8)

N/A. Massachusetts operates a comparable workfare program.

(d) Voluntary Workfare³⁰: State agencies and political subdivisions may operate workfare programs whereby participation by SNAP recipients is voluntary. In such a program, the penalties for failure to comply, as provided in 7 C.F.R. §273.7(f), will not apply for noncompliance. The number of hours to be worked will be negotiated between the household and the operating agency, though not to exceed the limits provided under 7 C.F.R. §273.7(m)(5)(ii). In addition, all protections provided under 7 C.F.R. §273.7(m)(6)(i) shall continue to apply. Those State agencies and political subdivisions choosing to operate such a program shall indicate in their workfare plan how their staffing will adapt to anticipated and unanticipated levels of participation for each Federal fiscal year covered by the Combined Plan under WIOA. FNS will not approve plans which do not show that the benefits of the workfare program, in terms of hours worked by participants and reduced SNAP allotments due to successful job attainment, are expected to exceed the costs of such a program. In addition, if FNS finds that an approved voluntary program does not meet this criterion, FNS reserves the right to withdraw approval.

N/A. Massachusetts operates a comparable workfare program.

(e) Comparable Workfare³¹: The State agency or political subdivision must provide a description of its program, including a methodology for ensuring compliance with 7 C.F.R §273.7(m)(9)(ii) for each Federal fiscal year covered by the Combined Plan under WIOA.

31 7 CFR § 273.7(m)(9)

32 7 CFR § 273.7(c)(8)

33 7 CFR § 273.7(c)(8)

DTA operates a self-directed (comparable) workfare program that is not supported by E&T funds. A SNAP recipient who is subject to the ABAWD rules may elect to meet the work requirement by volunteering at a non-profit, public, or quasi-public organization for a number of hours equal to the ABAWDs portion of the household's monthly SNAP grant divided by Massachusetts' minimum wage. Clients are encouraged to contact Central Office SNAP Path to Work staff prior to starting volunteer work to confirm that the selected organization qualifies as a workfare site. One way that a client may elect to show proof of compliance with the ABAWD Work Program Requirement is by submitting verification of completed volunteer hours. Volunteer work that is completed without prior approval must be validated before ABAWD Work Program compliance is recorded.

DTA has established relationships with non-profit, public, or quasi-public organizations that have agreed to host ABAWD volunteers. Those seeking volunteer opportunities may locate potential organizations via snappathtowork.org, contact Central Office SNAP Path to Work staff via the SNAP Path to Work Line for assistance. Workfare placements recommendations are made based on the client's location, language, experience, transportation needs, and Criminal Offender Record Information (CORI) status.

(f) Process³²: The State agency must submit amendments to the SNAP E&T segment of the Combined Plan for FNS approval at least 30 days prior to the planned implementation in order to receive federal SNAP E&T funding for the activities not covered by the approved *Combined Plan*.

(g) Plan Modifications³³: If FNS determines that the performance of a State agency with respect to employment and training outcomes is inadequate, FNS may require the State agency to make modifications to the State E&T plan to improve the outcomes.

Funding Disclaimer: Funds may not be available when SNAP E&T portions of a *Combined State Plan* under WIOA are approved. FNS's obligation after approving a SNAP E&T plan submitted as part of a *Combined State Plan* is contingent upon the availability of an appropriation from which payment can be made. Any FNS funding resulting from an approval of a SNAP E&T plan submitted as part of a *Combined State Plan* is subject to FNS receiving sufficient funds (in the Program Financial Control System for FNS) to fund this and all prior approved SNAP E&T plans submitted as part of a *Combined State Plan* in their entirety in the time and date order received. Federal reimbursement to States for 50 percent of State

administrative expenditures and for participant reimbursements is subject to the above conditions.

29 7 U.S.C. 2025(h)(5)(E) as amended by Agricultural Act of 2014.

TRADE ADJUSTMENT ASSISTANCE

(a) The TAA program is a required partner in the One-Stop delivery system, established under section 121 of the Workforce Innovation and Opportunity Act (WIOA). Therefore, given that the TAA program is part of the broader workforce system and a key goal for the TAA program is to ensure that trade-affected workers are able to successfully return to work, **ETA strongly encourages States to integrate their TAA program activities in concert with other workforce system core and partner programs that may also address the needs of trade-affected workers.** WIOA Sec. 103(3)(A)(B). Consistent with the Governor-Secretary Agreement, the States agree to use funds obligated under the TAA Annual Cooperative Financial Agreement (CFA), to carry out the TAA program, including: 1) ensuring integration of the TAA program into its One-Stop delivery system; 2) using the centers in this system or network as the main point of participant intake and delivery of TAA program benefits and services; and 3) ensuring the terms of the Memoranda of Understanding (MOU) with the Local Workforce Investment Boards, as established under WIOA section 121(c) will apply to the assistance provided by other One-Stop partners to TAA participants. (Trade Act Sec. 239 (a) as amended by WIOA section 512 (hh))

Describe the State's process for operating the TAA program that ensures coordination and integration with WIOA core and partner programs. Provide examples, if available, of how the co-location of Wagner-Peyser in One-Stop centers and the addition of Temporary Assistance for Needy Families (TANF), have improved access to these services for trade-affected workers.

Since July 2007, the Trade Programs have been integrated into the customer flow of a Career Center. In Massachusetts, TAA individuals are identified as dislocated workers and are treated as such.

TAARRNEG, a component of the MOSES database, assists in tracking benefits and services to potential and eligible TAA workers. Referrals are made to the career center of choice upon layoff date. The state also compiles a list of those workers who have filed UI claims against the company from the impact date to present through interfaces with the Massachusetts UI Online system and receives updates to those lists to provide notice to individual workers regarding the TAA Program.

Training is regularly conducted for all career center staff. All Trade policies are disseminated to staff and posted through Workforce Issuances for the career centers and the public to research and obtain. Data is also regularly reviewed and addressed with local Career Center staff to address co-enrollment requirements and required service provisions (e.g., benchmarks).

The Massachusetts Trade Unit operates on a team concept that promotes statewide consistency in the provision of TAA services. The Trade Unit's business plan includes process

improvements on a number of existing initiatives as well as the review of existing and the development of new processes and procedures. All services and processes are continually evaluated and improved as part of a continuous improvement strategy. This strategy continues with core and required partners under WIOA.

(a) States must develop and manage resources (including electronic case management systems) to integrate data, including co-enrollment data, provided through different agencies administering benefits and services to trade-affected workers in order to ensure consistent program administration and fiscal integrity, as well as reliable fiscal and performance reporting. (WIOA section 103(b)(3))

Describe how the State will use TAA funding for infrastructure, other shared costs, and the promotion of the development of integrated intake, case management and reporting systems.

The Trade Unit oversees and monitors the timeliness of local Career Centers' assistance to customers with the application process for UI benefits, training services, and other related program allowances provided in conjunction with other federal and state programs including access to services, (i.e., testing and initial and comprehensive assessment) and case management services consistent with state policy.

The following services are offered to all Trade Adjustment Assistance eligible customers:

- Rapid Response services
- Trade information and services follow up (Trade Orientations either onsite at the company or at the MassHire Career Center locations)
- Individual career counseling, use of assessment tools (i.e., TORQ) and testing (Career Ready 101/WorkKeys)
- Case management services
- A full menu of workshops and access to LMI type resources (i.e., O*Net, MassCIS),
- Training assistance
- Proactive job development services

Trade will continue to utilize and allocate case management and reemployment funds to local areas. As directed to local areas, in addition to covering staffing costs for career counselors, the "employment and case management services" funding may also be used for: assessment tests, skills transferability analysis, peer counselors, development and provision of labor market information, maintenance and enhancement of electronic case management systems to allow for improved case management services, information on available training, including provider performance and cost information; and, any other staff costs related to case management. This list is not intended to be all-inclusive.

(c) Except for States covered by the regulatory exemption 20 CFR 618.890 (c) or to perform non-inherently governmental functions, States must engage only State government personnel to perform TAA-funded functions undertaken to carry out the TAA program, and must apply to such personnel the standards for a merit system of personnel administration applicable to personnel covered under 5 CFR part 900, subpart F. (20 CFR 618.890)

Describe how TAA program-funded benefits and services are approved by merit-staffed employees in accordance with 20 CFR 618.890.

Although Trade customers flow through and receive access to benefits and services at the local career center level, all applications, and requests for benefits, both TAA training, waivers from training, job search and relocation allowances, RTAA and TRA, are submitted via MOSES or UI Online and a determination is issued by central merit-based staff located at MDCS or DUA, respectfully. There are also multiple interfaces between the two systems to allow accurate and timely processing of benefits.

Trade Adjustment Assistance (TAA) Program Assurances

The <i>State Plan</i> must include assurances that:	
1.	On an annual basis, the CSA will execute TAA Cooperative Financial Agreements and UI Funding Agreements for each fiscal year during the four-year State planning cycle.

Massachusetts Response:

On an annual basis, MDCS and DUA, respectively, will continue to execute and adhere to the conditions within the *TAA Cooperative Financial Agreements* and *UI Funding Agreements* for each fiscal year during the four-year State planning cycle.

JOBS FOR VETERANS STATE GRANTS

The Jobs for Veterans' State Grants (JVSG) are mandatory, formula-based staffing grants to 54 State Workforce Agencies, (including DC, PR, VI and Guam) to hire dedicated staff to provide Individualized Career Services to Veterans and eligible persons with significant barriers to employment (SBE); and to assist employers fill open positions with Veteran job candidates.

The JVSG Program supports the Disabled Veteran Outreach Program Specialist, (DVOP) and Local Veteran Employment Representative, (LVER) positions. DVOP Specialists provide Individualized Career Services to Veterans with significant barriers to employment, (SBE) prioritizing services to veterans who are; homeless, service-connected disabled, Vocational Rehabilitation Program participants, and Veterans that are economically and educationally disadvantaged. The JVSG Program is funded annually in accordance with a funding formula determined by the total number of Veterans seeking employment in Massachusetts compared to the total number in all states. The JVSG Program operates on a fiscal funding year, (not program year) basis, however, performance metrics are collected and reported using the ETA-9173 Report quarterly (using four "rolling quarters") in a Program Year basis. The JVSG Program

is part of the *Massachusetts Workforce Innovation and Opportunity Act (WIOA) Combined Four-Year State Plan*. JVSG grant recipients are required to provide Priority of Service to Veterans and covered persons in accordance with 38USC 4215. Massachusetts Proudly Serves those who served by providing Priority of Service to Veterans. The term qualified job-training program means any workforce preparation, development, or delivery program or service that is funded in whole or in part by Department of Labor. The term Priority of Service means with respect to any qualified job training program, that Veterans and covered persons receive priority over non-covered persons for the receipt of employment, training, and placement services. As a condition to receive funding, 38 U.S.C. § 4102A(c)(2) also requires States to submit an application for a grant that contains a *Combined State Plan* narrative, which includes:

A. HOW THE STATE INTENDS TO PROVIDE EMPLOYMENT, TRAINING AND JOB PLACEMENT SERVICES TO VETERANS AND ELIGIBLE PERSONS UNDER THE JVSG;

All customers who appear for services at a MassHire Career Center, either online or in person are asked if they are a Veteran, (served in the U.S. Armed Forces). If the customer identifies as a Veteran, Veterans and covered persons are immediately informed of their Priority of Service status in accordance with VPL 07-09. Covered persons includes any of the following: any veteran who died of a service-connected disability, any member of the armed forces serving on active duty who is at time of application for priority of service is missing in action, captured in the line of duty by a hostile force, or forcibly detained or interned in the line of duty by a foreign government or power. MassHire Career Center staff first offer the Veteran a spot in the next Career Center Seminar (orientation) the main portal into the Massachusetts Workforce Development and MassHire Career Center System. This orientation provides all customers including Veterans information on, and access to, the full array of services, programs, and activities available at or accessible from the Career Center. As part of the orientation the Veteran will complete a self- assessment of their work search strategies, if appropriate, complete the Career Readiness 101 assessment, complete a job profile with a career counselor and establish the next appropriate steps in their Career Plan. If it is determined that the Veteran has a Significant Barrier to Employment (SBE) during the initial assessment or triage, the Veteran is referred to the DVOP for Individual Career Services. (MassHire does not utilize any consolidated positions.) The full array of Career Center Services offered could include any of the WIOA or partner program services such as, Title I Adult, Dislocated Worker, Wagner-Peyser, Vocational Rehabilitation, and Youth Programs. DVOP staff also partner with many additional organizations and partners that assist local area veterans.

If the Veteran customer prefers not to attend a Career Center Seminar, (CCS) they are provided with information on the full array of services available and scheduled for the next appropriate service. The Veteran will be directed by non-DVOP staff to complete the Eligibility Triage Form to identify whether they are eligible for DVOP services. If the Veteran is eligible for DVOP services, they are referred to a DVOP specialist. Beginning with the first formal meeting, DVOP staff begin conducting a comprehensive assessment and begin the career planning process, to

better understand the overall situation facing the Veteran, and its impact on employability. During the career planning process, the Veteran and DVOP staff work in collaboration to develop an individual employment plan (IEP). The IEP serves as a road map for the Veteran to obtain employment. The IEP is used to set employment goals and to identify and mitigate existing barriers to employment.

DVOP staff work with a wide variety of WIOA and JVSG Partners as resources for local area Veterans. For example, there are seven Regional Veteran Collaborative Organizations in Massachusetts. Regional Veteran Coalitions help establish strong working partnerships with Veteran organizations and the community at large to improve services to Veterans. These organizations consist of Federal, State, and local area members who provide services to, or are interested in helping Veterans. These local Veteran partners meet on a regular basis to keep everyone abreast of the programs and services they provide to Veterans. DVOPS also conduct regular outreach which includes Veterans Affairs, (VA) facilities such as VA Hospitals for walk-in clinics. Walk-in clinics often include DVOP, VA, and Homeless Veterans Reintegration Program, (HVRP) staff, making them a one stop shop so SBE Veterans can receive prompt assistance. If housing is an emergent situation, we will immediately refer the Veteran to HVRP staff or a Community Based Organization, (CBO) Homeless shelter. DVOP staff also refer homeless and other low-income Veterans to Massachusetts City and Town Veteran Service Officers, (VSO) for Massachusetts General Law, (MGL) CH115 benefits program which provides financial aid for food, shelter/housing, clothing, and medical care to Veterans and their dependents with limited income that reside in Massachusetts. The same CH115 referral process is followed with other Low-Income Veterans. We also utilize additional Massachusetts services such as the Supplemental Nutrition Assistance Program, (SNAP) to help food purchases and free meals for children, etc. DVOP staff work with the Massachusetts Veterans Courts, and HVRP Incarcerated Veterans Transition Program, (IVTP) and Volunteers of America, (VOA) to assist formerly incarcerated veterans into employment. DVOP trainings include criminal record information, (CORI) trainings so records can be sealed if possible or explained. DVOP staff coordinate with their Business Services, (BSR) Teams and the LVERs to identify new local employment openings and assist veterans with job matching and placement.

B. THE DUTIES ASSIGNED TO DVOP SPECIALISTS AND LVER STAFF BY THE STATE; SPECIFICALLY IMPLEMENTING DVOP AND LVER DUTIES OR ROLES AND RESPONSIBILITIES AS OUTLINED IN 38 U.S.C. § 4103A AND 4104. THESE DUTIES MUST BE CONSISTENT WITH CURRENT GUIDANCE;

The primary role of the DVOP staff is to guide Veterans, (or other eligibles) with significant barriers into employment who are most in need of Individualized Career Services. Refer to VPL 03-19 Designation of Additional Populations Eligible for DVOP Services, 03-14 changes 1 and 2, Expansion and Clarification of Significant Barriers to Employment, and VPL 03-14 JVSG Program Reforms and Roles and Responsibilities of staff serving veterans. For those Veteran customers who do not face significant employment barriers, the Commonwealth relies heavily on its WIOA

partners (particularly Wagner-Peyser) to provide the services typically sought by such “job ready” individuals.

Consistent with National Veterans Training Institute, (NVTI) Training, all eligible Veterans, (or eligible spouses or other eligibles) seeking employment receive Individualized Career Services from DVOP or Career Center staff, through the framework of Career Planning. DVOP staff follow the MassWorkforce Career Planning Issuance 100 DCS 08.112.3. Career Planning is the framework for DVOP services, providing the Veteran with an individual employment plan, (IEP). The career planning framework welcomes partner staff collaborations, addresses barrier mitigation, and provides a structure leading to employment. The responsibility of providing services to these “most in need” Veterans, (or eligible spouses or other eligibles) falls primarily on grant funded DVOP staff. Massachusetts will continue to “case manage” Veterans, (or eligible spouses or others eligible) seeking employment from all the above categories by a DVOP whenever possible (based on the state staffing plan and taking into consideration the best interests of the individual Veteran).

Outreach and linkage to those Veterans, (or eligible spouses or others eligible) most in need of individualized services is an ongoing top priority. Local DVOPs have direct contact and coordination with homeless Veteran shelters (HVRP grantees) to provide direct services and training program opportunities leading to gainful employment and self-sufficiency. Included in these outreach efforts are broad-based marketing and promotion of Veteran-oriented events, job fairs and education/training programs. To establish strong working partnerships with Veteran organizations and the community at large, MassHire DVOP staff outreach to Veteran partners such as HVRP, VA, and belong to Regional Veterans Collaboratives. These seven Massachusetts regional Veteran partner networks all work together to assist local area veterans and their families. DVOP staff liaison with and conduct outreach activities with their Massachusetts Veteran Collaborative Organizations, Executive Office of Veteran Services, (EOVS), VA facilities, VA VET Centers, VR&E offices, Veteran Courts, HVRP grantees, including IVTP, and Homeless Female Veteran and Veterans with Families Program, (HFVWWF), Homeless shelters, Stand Downs, Military, and demobilizing Guard and Reserve. Additionally, DVOP staff develop annual outreach plans with their local managers to promote contact with all the organizations that touch Veterans within their service delivery areas. The primary goal of the outreach plan is to locate and provide employment assistance to SBE Veterans, (or eligible spouses or others eligible). DVOP staff and their local managers follow Massworkforce Issuance 100 DCS 15.104: Jobs for Veterans State Grant (JVSG): Disabled Veterans Outreach Program (DVOP) Outreach Plans, for instructions on developing and implementing outreach plans.

According to the Massachusetts One Stop Career Center Activity Report, (OSCCAR) for PY22, approximately 31% of the Veterans, (or eligible spouses or other eligibles) receiving an approved service at the MassHire Career Centers had a service-connected disability or were economically or educationally disadvantaged; or had another SBE as defined by DOL/VETS. Prioritizing services to these targeted Veteran categories are facilitated by specifically “flagging”

such “at risk” Veteran customers within the Massachusetts One-Stop Employment System (MOSES) database. SBE Veterans, (or eligible spouses or other eligibles) receive a “Gold Star SBE icon” marker in MOSES for ease of identification. As part of our overall SBE Outreach Plans DVOPS are also provided with weekly/monthly SBE reports for their individual career centers so they can outreach to those SBE Veterans, (or eligible spouses or other eligibles) and personally offer DVOP employment assistance and individual career services. MassHire and Career Center websites contain a Veteran’s triage form so Veterans, (or eligible spouses or other eligibles) can request staff assistance. SBE Veterans, (or eligible spouses or others eligible) are referred directly to DVOP staff, while non-SBE Veterans are referred to Career Center managers for assignment.

LVER staff advocates for employment and training opportunities with business, industry, and community-based organizations to secure gainful employment for SBE and Veteran, (or eligible spouses or other eligibles) customers. The LVER organizes regional job fairs and job search workgroups that include Veterans, (or eligible spouses or others eligible) promotes credentialing and licensing opportunities for Veterans, (or eligible spouses or others eligible) and job driven apprenticeship opportunities for Veterans, (or eligible spouses or others eligible). The role of the LVER is to improve access into the appropriate employment and training service for all Veterans, (or eligible spouses or others eligible) within the MassHire employment service delivery system. MassHire continues to hold a license agreement with the Premier virtual job fair platform. The LVERs work with regional Business Services Teams to conduct regional Veteran, (or eligible spouses or others eligible) job fairs and to incorporate the Premier virtual platform into statewide use. JVSG Program leadership will engage with HVRP and other Veteran partners to explore utilizing Premier to hold tailored regional job fairs. The LVERs will conduct regular trainings with DVOPs and Veterans, (or eligible spouses or other eligibles) to demonstrate how to navigate the Premier platform to access virtual online job fairs more successfully. Using the Premier platform has amplified awareness of job fairs for both Veterans, (or eligible spouses or others eligible) and employers. A previous example of the benefit of the Premier platform is a statewide, weeklong, job fair held in August of 2021 that reached 1,700 employers, 17,000 job seekers, with 600 identified veterans, (or eligible spouses or others eligible). The JVSG Program will continue to utilize the Premier platform in this manner. JVSG Program Leadership will work with the Premier staff to flag all self-identified Veteran job seekers and Veteran friendly employers.

The Commonwealth’s LVERs will work with the Governor’s Workforce Skills Cabinet, MassHire BizWorks and Core WIOA Partners to advocate for employment and training opportunities with business, industry, and community-based organizations, and conducts job development activities to secure gainful employment for Veteran, (or eligible spouses or others eligible) customers. The Workforce Skills Cabinet aligns employment and employer resources shared by the Executive Offices of Labor, Workforce Development, Education, and Housing Development. MassHire BizWorks, (also known as Rapid Response) provides services to businesses throughout

the business cycle; and provides Massachusetts businesses with a single point of contact to leverage available state and federal resources. This association can also assist with marketing and support of the Department of Labor VETS Hire Vets Medallion Program, (HVMP) throughout Massachusetts. JVSG Program leadership will continue to promote the HVMP to employers that participate in virtual job fairs. The LVERs outreach to federal contractors and liaison with the Office of Federal Contract Compliance Programs, (OFCCP), promotes Veterans preference. The LVERs will work with the Recruiting Solutions Initiative, (RSI). This initiative focuses on providing job candidates for large scale hiring efforts. The LVERs will collaborate with RSI employers and hiring teams and inform them about Veteran attributes, and advocate for strong Veteran, (or eligible spouses or other eligibles) candidates.

C. THE MANNER IN WHICH DVOP SPECIALISTS AND LVER STAFF ARE INTEGRATED INTO THE STATE'S EMPLOYMENT SERVICE DELIVERY SYSTEM OR AMERICAN JOB CENTER;

The Commonwealth's Career Centers are fully and seamlessly integrated with the full array of WIOA Title I, Wagner-Peyser and other key workforce partner services co-located under one roof. The goal is to as quickly as possible deliver the desired and appropriate services. Integration also means that initial services provided to eligible Veterans, (or eligible spouses or others eligible) are provided by staff other than DVOPs. In person triage and Initial Assessments are provided by Wagner-Peyser and partner staff. Through this process customers are asked to self-identify if they are a Veteran, (served in the US Armed Forces or eligible spouses or others eligible). Those customers who have self-identified and are SBE Veterans, (or eligible spouses or others eligibles) are referred immediately to the DVOP for services. If a DVOP is not available, (position vacancy) and individualized career services are appropriate, a case plan is developed and the Veteran, (or eligible spouses or others eligible) will be assisted directly by Career Center staff or referred to supportive services as appropriate. If the Veteran, (or eligible spouses or others eligible) has not self-identified as an SBE, Veteran services are provided on a priority basis by Career Center staff.

As an example of integration, a Veteran, (or eligible spouses or others eligible) in need of additional training/schooling to be more employable is "fast tracked" through the eligibility determination and enrollment process. In such a situation, the Veteran's primary case manager may well be another Career Center staff rather than the DVOP. However, the DVOP will be either the primary or alternate case manager for any SBE veteran enrolled in a training program. To ensure teamwork and efficient coordination of services DVOPS also co-case manage with additional Career Center and partner staff. Incorporating partners in case conferences provides consistent messaging and reinforcement to the veteran. This integration applies to other Career Center partners as well, including all WIOA partners such as the Massachusetts Rehabilitation Commission, Department of Transitional Assistance, state colleges and universities, Adult Education, Senior Community Service, and Training programs. JVSG staff are all co-located at MassHire Career Centers, so they have direct access to all partners. JVSG staff attend a myriad of MassHire workforce trainings, present JVSG trainings,

and update staff during weekly/monthly career center all staff meetings. Local HVRP grantees often have office space within the career center and work with both veterans and career center staff. Several DVOP staff serve on the MassHire Workforce Development Boards, (WDBs). They provide JVSG Program updates and trainings, attend quarterly partnership meetings, and participate in the development process of local Memorandum of Understandings, (MOU). Career Center Managers also attend regular JVSG staff trainings and meetings provided by JVSG Program Leadership. At the state level, and working throughout the system, key partnerships exist with the VA, DVS, HVRP, and other Veteran partners who are represented at local MassHire Career Center and Veteran events, (job fairs, and information sessions). The Commonwealth has designated a DVOP as the Individualized Services Coordinator, (ISC) for the Veteran Readiness and Employment Program (VR&E). This individual is co-located on a part time basis with VA's state level VR&E Employment Coordinator, (EC). The ISC oversees the Individual Employment Plan, (IEP) for all VR&E participants to monitor progress and meets regularly with the VA EC to coordinate services and resolve issues. The VR&E/ISC team conducts regional training sessions with DVOP staff, while also attending regional VA trainings with VA staff and counselors.

Another key partnership exists with the Commonwealth's Executive Office of Veterans Services (EOVS). Through this agency, each Commonwealth town and municipality has an assigned Veterans' Services Officer, (VSO) to provide a wide range of benefits and services to Veterans. Cross training and relationship building at the state and local level have enhanced the ability to quickly address the needs of Veterans. The MassHire and EOVS partnership extends to every area in Massachusetts. EOVS staff are essential partners and active members in all seven Massachusetts Regional Veterans Collaborates. Eligible Veterans receive financial assistance, so they can pursue employment and receive individual employment services from DVOP staff. Chapter 115 benefits can be used to help relieve some employment barriers by paying for housing and daily living expenses. In addition to working together to assist individual Veterans, MassHire JVSG and EOVS staff routinely participate in veteran roundtable events, employment workshops, and job fairs. JVSG staff also utilize the EOVS Statewide Advocacy for Veterans Empowerment, (SAVE) team to advocate for Veterans trying to access benefits and supportive services. EOVS regularly participates in local, regional, and statewide Veterans' programs events and training sessions. MassHire and EOVS will work toward an improved referral process to increase job placement rates for Veterans that receive Chapter 115 benefits.

Linkage to employers occurs because the LVERs are regionally aligned with robust MassHire career center business services teams to address Veterans employment opportunities in an integrated, full-service manner. Utilizing available tools such as Work Opportunity Tax Credit, (WOTC) and state training grants, the teams promote the benefits of hiring Veterans. There is a direct focus on federal contractors as well, assisting them with posting their openings through the MassHire career center system.

Massachusetts makes a concerted effort at the regional and local level to link training vendors, employers, and Veterans, (or eligible spouses or others eligible). Programs in demand careers such as “bio-medical” and advanced manufacturing are being designed and run specifically for Veterans. Edge4Vets is an employment workshop series for Veterans, Guard, and Reservists. These employment workshops help Veterans translate their military skills and strengths. Veterans learn about individual company culture and the hiring process. Company mentors help veterans match their skills and interests to jobs leading to a career at one of the participating companies. A dozen Massachusetts employers are currently participating in Edge4VETS.

The Life Sciences Veterans Action Network, (LSVAN) is a coalition of leading life science companies. Their employee resource group collaborates as a network dedicated to improving health and employment outcomes for Veterans and their families. LSVAN offers Massachusetts Veterans networking opportunities and career fairs for jobs in the life sciences industry.

The Commonwealth of Massachusetts provides regional employment workshops to recruit and assist Veterans into employment with the Commonwealth of Massachusetts. These workshops are co-facilitated by the Commonwealth’s Diversity Officer and regional DVOP teams.

D. THE INCENTIVE AWARD PROGRAM IMPLEMENTED USING THE 1% GRANT ALLOCATION SET ASIDE FOR THIS PURPOSE, AS APPLICABLE;

Massachusetts will utilize the 1% set-aside Performance Incentive Award funding for this four-year period. The incentive will be used to reward MassHire Career Centers that lead the state in demonstrated services to Veterans. Application for the nominations for the incentive awards are due in June of each year. Nominations are reviewed and winners are selected in July. All funds are obligated by August 31, of each year and funds are expended by December 31 of each year. Incentive Award report is submitted in 4th quarter each year.

The award recognizes the entire staff of a Massachusetts MassHire Career Center, not just a Veterans’ unit or Veterans’ staff, which demonstrates excellence and dedication in the provision of quality employment, training and placement services to United States Veterans and other eligible persons.

The award recognizes a MassHire Career Center that has made a substantial contribution or effort to:

- Improve and modernize employment and placement services, as well as training opportunities for Veterans and other eligible persons.
- Reward and celebrate excellence in the provision of “Priority of Service” and integration of services to Veterans and other eligible persons at the Career Center.
- Improve performance outcomes for Veterans and other eligible persons.

- Establish strong SBE outreach partnerships and strategies with other Veteran organizations and/or the community at large to improve services to Veterans and other eligible persons.
- Design and develop innovations, approaches, and supportive services etc., in short best practices that demonstrate the Career Centers commitment to excellence in provision of quality employment and training services to Veterans and other eligible persons.
- Strong Veteran Career Planning and counseling techniques leading to employment outcomes.

Completed nominations are reviewed and ranked by Veteran Employment, Training, and Central Program Units. Monetary Incentive Awards are made annually to the highest scoring MassHire Career Centers that made a concerted, measurable effort to attain high standards in the provision of services to Veterans most in need. The individual amounts may be divided as in the following- example:

- GOLD: \$14,100
- SILVER: \$9,105
- BRONZE: \$7,105
- RISING STAR: \$3,105

Funds are awarded to the lead operators of the recognized MassHire Career Centers for specific center needs such as computer hardware/software; resource room or library materials; transfer to training accounts; or other office-wide uses; consistent with the improvement of employment and training services to Veterans.

Funding permitting, a portion from the JVSG Base Allocation Amount will be used to purchase plaques for individual and office recognition.

E. THE POPULATIONS OF ELIGIBLE VETERANS TO BE SERVED, INCLUDING ANY ADDITIONAL POPULATIONS DESIGNATED BY THE SECRETARY AS ELIGIBLE FOR SERVICES, AND ANY ADDITIONAL POPULATIONS SPECIFICALLY TARGETED BY THE STATE WORKFORCE AGENCY FOR SERVICES FROM ONE-STOP DELIVERY SYSTEM PARTNERS (E.G., NATIVE AMERICAN VETERANS; VETERANS IN REMOTE RURAL COUNTIES OR PARISHES);

Under this plan, (IAW VPL 03-14, Chg1, Chg2, and VPL 03-19) service priority for JVSG staff will be targeted to:

- Veterans with service-connected disabilities as defined in 38 U.S.C. 4211 (1) and (3) special disabled and disabled Veterans including those: (who are entitled to compensation, or who but for the receipt of military retired pay would be entitled to compensation) or under laws administered by the Secretary of Veteran affairs; or were discharged or released from active duty because of a service-connected disability;

- Veterans Between the Ages of 18-24;
- Recently-separated Service Member, as defined in 38 U.S.C. and 4211(1) and (3) who have been unemployed for 27 weeks or more in the previous 12 months;
- Homeless, as defined in Section 103(a) and (b) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11302(a) and (b) as amended;
- An offender, as defined by WIOA Section 3 (38), who is currently incarcerated or has been released from incarceration;
- Lacking a high school diploma or equivalent certificate;
- Low-income (as defined by WIOA at Sec. 3 (36);
- Eligible Transitioning Service Members, Spouses, and Caregivers; as defined in 38 U.S.C. 1720G (d):
 - a. Transitioning service members of the Armed Forces who have been identified as in need of individual career services.
 - b. Members of the Armed Forces who are wounded, ill, or injured and receiving treatment in military treatment facilities, (MTF) or warrior transition units, (WTU);
 - c. The spouse or other family care givers of such wounded, ill, or injured members.
- Vietnam and Vietnam Era Veterans

F. HOW THE STATE IMPLEMENTS AND MONITORS THE ADMINISTRATION OF PRIORITY OF SERVICE TO COVERED PERSONS;

The description of how the state implements and monitors priority of service to covered persons is included in the *Common Elements* of the *WIOA State Plan*.

G. HOW THE STATE PROVIDES OR INTENDS TO PROVIDE AND MEASURE, THROUGH BOTH THE DVOP AND AMERICAN JOB CENTER STAFF:

1. JOB AND JOB TRAINING INDIVIDUALIZED CAREER SERVICES;

Per VPL 01-22, a response to this section is not required.

2. EMPLOYMENT PLACEMENT SERVICES; AND

Per VPL 01-22, a response to this section is not required.

3. JOB-DRIVEN TRAINING AND SUBSEQUENT PLACEMENT SERVICE PROGRAM FOR ELIGIBLE VETERANS AND ELIGIBLE PERSONS;

Per VPL 01-22, a response to this section is not required.

H. THE HIRE DATE ALONG WITH MANDATORY TRAINING COMPLETION DATES FOR ALL DVOP SPECIALISTS AND LVER STAFF.

Per VPL 01-22, a response to this section is not required.

i. Such additional information as the Secretary may require.

JVSG Performance Targets have been determined using the JVSG Performance tool for MA.
Current JVSG Performance Targets are:

Employment Rate Q2 After Exit 56%

Employment Rate Q4 After Exit 56%

Median Earnings Q2 After Exit \$8,000

UNEMPLOYMENT INSURANCE

MASSACHUSETTS STATE QUALITY SERVICE PLAN
OCTOBER 1, 2022 – SEPTEMBER 30, 2024

Please refer to the following *UI SQSP Package* in *Attachment H*:

1. *SQSP Transmittal Letter*
2. *Budget Worksheets/Forms*
3. *Corrective Action Plans (CAPs)*
4. *UI Program Integrity Action Plan (UI IAP)*
5. *Organizational Chart*
- 6.

SQSP Signature Page

A. Overview

This Plan focuses on:

- Improving the Measurement and Management of our CAPs;
- Focusing on the core UI program fundamentals;
- Maintaining the progress we have made; and
- Targeted, prioritized plans to improve

Our values, philosophy, and vision are captured in our Mission Statement:

Our job is to get it right the first time, and to do so timely, while:

- Delivering friendly and professional service to all our customers;
 - Protecting the UI Trust Fund, and combating fraud in all forms;
 - Reliably assisting claimants with temporary income replacement and re-employment efforts;
 - Helping businesses grow and prosper in Massachusetts; and
 - Equipping our team with tools and training to empower our staff and challenge them to be the best
- As mentioned in previous State Quality Service Plan (SQSP) narratives, the Massachusetts Department of Unemployment Assistance (MDUA) bonded for and started to replace our UI Online web based, self-service tax and benefits system. The mission of our Employment Modernization and Transformation (EMT) Project is to achieve the following:
 - Provide outstanding service to the workforce and businesses of MA. Provide an improved customer experience, that is accessible to all, is compliant with the law, and available online, by phone, and in person. Deliver timely and accurate benefits and use the taxpayer's money efficiently.

- Be a national leader. Be among top performing states on federal performance measures focusing on timely and high-quality services and ensuring accessibility and equity in providing services to the workforce.
- Operate efficiently and ensure program integrity. Ensure that benefits are being disbursed to valid and legitimate unemployment claims and eliminate ineffective or unnecessary business processes to better provide streamlined service to customers.
- Provide accurate, timely and responsive reporting. Ensure that data is accurate and is provided timely and can flexibly respond to stakeholder needs and inquiries.

The primary focus of the EMT program remains the Commonwealth's unemployment benefits delivery system and operations. We implemented the Revenue portion of the new system on September 12, 2023. We expect to launch the benefits portion in 2025.

In order to try to meet workload demands, we are continuing to work with the current administration to retain staff, train existing staff to resolve more and different types of issues, meet daily to strategize new ways to gain efficiency, participate in regional and national calls to share best practices, implement technology solutions to improve timeliness, repurpose resources to critical work units, and deploy many, many other performance improvement initiatives. Our issue counts and appeals are decreasing, but this work will continue to be the major area of focus for our organization for the upcoming fiscal year.

National Priorities

i. Rebuilding and Improving Program Performance by Addressing the Significant Impact that the Workload Created by the COVID-19 Pandemic continues to have on the UI System

Our UI Performs department and the Contact Center began an initiative to increase our federal performance metrics including:

- On-going training and refresher for all Adjudication staff.
- Initiating training for all Contact Center supervisory staff with UI Performs supervisors to learn how quarterly Federal BTQ (Benefit Timeliness Quality) scoring is done and using those criteria for regular internal BTQ scoring of cases for their adjudication staff.
- Monthly review of scoring and follow-up meetings with UI Performs supervisors scheduled to ensure consistency and continuous learning for Contact Center supervisory staff.

We are proud of the work and progress made in this area and are continuing this effort. Our department also underwent several organizational changes to ensure we are working efficiently including a merge of our Contact Center Operations Unit with Call Monitoring Shifting the Program Integration unit into the Contact Center Special Programs (Section 30, TRA/TAA, SAVE, Workshare) unit to ensure employer and claimant issues are now resolved in one department for TRA/TAA and Workshare.

The organizational changes mentioned allow us to restructure the Benefit Performance department to have dedicated resources managing federal reporting and audit responses. We are currently drafting updated job descriptions for this department.

ii. Focusing on Improving the Timely Delivery of Benefit Payments and the Reduction of the UI Adjudication and Appeals Backlogs

The Massachusetts Department of Unemployment Assistance has taken proactive measures to improve the timely payment of benefits and address the adjudication backlog.

Several key initiatives have been implemented including the shifting of staff from other departments to focus on resolving specific issue types. By reallocating resources and focusing on specific issue types, we can resolve issues promptly and accurately. This has enhanced staffs' expertise and has expedited the resolution of non-monetary issues.

We have also created a workgroup with supervisors and frontline staff who meet weekly to identify areas where we can improve and streamline processes. This group is actively evaluating existing procedures and identifying bottlenecks to create more efficient workflows.

Additionally, management is conducting thorough reviews of reports generated to identify patterns, trends and specific areas that require attention. By staying proactive, we have been able to address issues before they escalate.

Implementation of fraud prevention and detection tools have made meeting timely payment metrics challenging. Additional steps at the claim filing process to verify identities often cause delays in reviewing the non-monetary issues on a claim. We hope DOL will reevaluate this metric to allow identity verification prior to measuring timeliness.

In our Hearings department, we are continuing our efforts on the effective use of technology to improve performance. We will continue to use telephone and virtual hearings to avoid delays in the disposition of appeals. In 2020, Massachusetts began to offer virtual hearings for Identity Verification appeals. The virtual hearings were expanded to include regular UI and two-party in late 2021. Some parties have experienced technical challenges when participating in virtual hearings, but we have continuously updated our system and correspondence to assist these parties. Scheduling hearings via telephone and virtually has allowed us to reassign cases whenever an examiner is unexpectedly absent.

Hearings Management will continue using reports to inventory all appeals to ensure all appeals are scheduled and disposed in a timely manner. Support staff will continue to monitor last minute schedule openings and contact parties to determine if parties are willing to waive advance notice to participate in a hearing sooner. These methods have proven successful in the past and we are certain that we will see continued improvement.

iii. Ensuring Equitable Access to UI Programs

Much of our focus on equity is being addressed through our modernization project. As previously mentioned, MADUA's modernization project has two phases. The first phase encompassed redesigning the revenue system, with a major focus on accessibility.

The new system's e-services function, hosted by the FAST UI platform, is mobile friendly. Our prior system was not. In addition, we have made e-services available in both Spanish and English. MADUA did a complete plain language review of all of the e-services screens and employer correspondence encompassing over 100 letters, we retained a vendor, Level Access, to assist us in this review.

Finally, MADUA did a complete accessibility review of e-services with the assistance of a vendor, Level Access.

All of the same accessibility upgrades will be carried out in the second phase of the project, e-services for claimants. In addition to the above, MADUA provides many of the letters to claimants their preferred language in one of 13 different statutorily required languages. MADUA engages vendors for translation of customer service telephone communications and appeal functions in many more languages.

iv. Supporting the reemployment of UC claimants through Reemployment Services and Eligibility Assessments (RESEA), Short-Time Compensation (STC), robust work search activities, and other targeted initiatives

MADUA has a strong partnership with MassHire Career Centers (MHCC). MADUA has engaged MHCC, along with Abt Associates to continue the important work of evaluating the RESEA program, in order to engage UI recipients most likely to exhaust benefits to facilitate the reemployment who may have barriers.

DUA continues to dedicate a team of people whose full-time job is to work on the programs where UI and employment services integrate. In addition, MADUA's Policy and Performance department facilitates a UI Chat program every 3 months where pertinent information and any policy or procedure changes are covered. These chats also provide an opportunity for MHCC staff to ask UI related information directly from a DUA subject matter expert. During the past year MADUA, along with MHCC has worked to complete the evaluation structure for the RESEA program. This includes a data request which will run throughout the evaluation as well as a customer survey for participants of the program. In the coming year we will continue to receive data from program participants and complete on-site career center interviews.

MADUA prides itself on being one of the first states to implement the STC program. We will continue to engage the employer community to develop strategies which will help them make informed decisions when considering this layoff aversion program.

MADUA utilizes a wide array of work search activities to assist claimants with rapid reemployment. We will continue to monitor and enhance the claimant's ability to accurately describe those activities in an effort accelerate their reemployment opportunities as well as prevent improper payments.

v. Ensuring UI program integrity by assessing and evaluating fraud risks, implementing, and maintaining sufficient controls to effectively mitigate the likelihood and impact of fraud, and reducing improper payments

Massachusetts Department of Unemployment Assistance (DUA) continues to experience upticks in fraudulent attempts to access unemployment insurance benefits. Fraudulent attempts are increasing across the country and Massachusetts is no exception. DUA continues its efforts to prevent, detect, and capture these fraudulent claim attempts using a multi-layered approach. DUA is committed to ensuring program integrity while expeditiously sending benefits to eligible claimants. Updating DUA's website with warnings and providing an easy reporting

method anyone who believes a fraudulent unemployment claim has been filed on their behalf has been instrumental in tackling this issue early and preventing improper payments. DUA will also utilize funding recently awarded associated with UIPL 11-23, to mitigate fraud risks and to better integrate and utilize the current fraud analytics and software available to the agency.

- Massachusetts focuses on both eligibility fraud and identity fraud:
 - o Eligibility fraud occurs when a claimant provides false information to receive benefits for which the claimant would not otherwise be qualified.
 - o Identity fraud is when one person acquires and uses the identifying information of another person to illegally receive benefits. The fraud can happen either at the time of the UI application submission, or by changing key user data like bank account information after a claim has been established.
 - o The recent uptick in fraudulent claims is people filing fraudulent UI claims, likely using personal information stolen in previous national data breaches, for example those occurring in the health care or retail industries, in the hopes of getting benefits they're not entitled to. DUA is detecting and capturing these fraudulent claim attempts.
 - o Hacking of UI claims related to phishing attempts which encourage users (claimants) to enter login or other PII or fake websites which spoof our current UI online system in attempt to steal this information to divert payment to fraudulent bank accounts.

DUA is committed to ensuring program integrity and detecting and capturing these fraudulent claim attempts, while ensuring equitable access for all unemployment insurance applicants and expeditiously sending benefits to eligible claimants.

DUA is working with its partners at the Massachusetts Attorney General's Office, the U.S. Department of Labor's Office of the Inspector General, and Executive Office of Technology Services and Security to take proactive action regarding fraudulent claims. DUA will assist in any law enforcement investigation into these matters if requested.

For eligibility fraud, DUA leverages its partnerships with various stakeholders, including employers, we actively pursue information which calls into question a person's eligibility.

For identity fraud:

- o The Department relies on employer engagement during the initial claim process as well as tools and service providers in fraud management operations.
- o DUA uses a layered approach to identification verification. As such DUA utilizes multiple tools to achieve accurate and efficient determinations on all claims, including:
 - Partnering with vendors to provide identification verification along with data analytics of claims.
 - ID.me: Provides ID verification in cases where we need additional information to establish a person's identity.

- UI Online enforces multifactor authentication (MFA) for access to privileged accounts.
- Utilizing the Integrity Data Hub (IDH), a USDOL initiative via NASWA to share data among states to reduce the improper payment rate, specifically fraud related overpayments.
- MDUA will add the USDOL recommended ID proofing solution Login.gov and USPS to its identity verification process.

Since the hiring of a Director of Program Integrity we have reorganized the unit, added additional supervision and continue to build out the team. In August 2023, Massachusetts welcomed NASWA on-site at our Boston office for two days to meet with our new Program Integrity leadership to discuss how NASWA can help strengthen benefit integrity efforts in Massachusetts. We discussed our current processes and procedures related to integrity efforts and DUA's current use of IDH/SAR tools and services. DUA learned how to better utilize the NASWA/Integrity Center tools currently available to us and how IDH/SAR tools can be used to strengthen DUA's integrity and fraud detection/prevention methods in the modernized system. We have also engaged USPS/Login.gov for DOL sponsored identity proofing. We are in the planning phase of the project and look forward to adding this tool to our current process.

vi. Addressing Worker Misclassification

DUA's Field Audit department passed the Effective Audit Measure (EAM) consistently since 2015, finding an average of approximately 5000-6000 new workers annually, across approximately 2200-2400 annual audits. During the pandemic, MADUA field audit staff was reassigned to assist with UI Benefits due to the COVID-19 pandemic. Shortly after, the Revenue department started modernization work. The department has not been at full staff, causing failure of the EAM since said reassignment(s) due to lack of staffing and thus lack of completed audits.

The new modernized UI system went live on September 12, 2023. Audit resources are still supporting other departments through the stabilization period of the new system. However, audit resources will return to the audit department and begin scheduling 2024 audits by the end of the year. The audit department will resume normal duties in January 2024. We look forward to the audit department detecting and finding misclassified workers across the Commonwealth and meeting the required metrics again by utilizing our successful referral and investigative measures below:

Investigating internal referrals from other departments (i.e., Status-Section 2, BAM, etc.);
Investigating external referrals from outside the Agency in conjunction with our Council for Underground Economy (CUE) participation, where tips and referrals are shared amongst many different agencies; and
Targeting specific NAICS codes for historically problematic industries

vii. Ensuring accurate and complete reporting of ETA Required Reports

Federal emphasis (GPRA goals), if required
State performance compared to the GPRA goals.
Actions planned to achieve GPRA goals and targets.

Strategic Goals

Make Timely Benefit Payments

Target: 87.0 percent of intrastate first payments for full weeks of UC will be made within 14/21 days from the week ending date of the first compensable week.

This is a fundamental tenet of UI, and making payment when due remains our primary goal, and the need to make timely payments has been particularly challenging as we move away from the pandemic. While more specifics of our plan can be found in the Corrective Action Plan, we can share some updates here.

In our contact center environment, where most of our non-monetary issue resolution work is being performed, we have created and implemented a live adjudication process. When an agent receives a call related to a non-monetary issue, it is directly transferred to our adjudication team. This new process increases the likelihood of the issues being resolved within the 21-day period. Over the past year we have seen improvement in our ability to resolve non-monetary issues quicker.

While we focus on timeliness, we remain committed to preserving our improvements in quality. Any sustainable process to ensure timeliness must also ensure quality standards are met. Ideally, there must be a balance. To accomplish this goal moving forward, we implemented a new refresher training for adjudicators that all contact center staff were required to attend. Additionally, we will put in place frequent informal one-on-one and small group training sessions. The BTQ process will continue to be used as a tool for adjudication quality improvement and improved communication around that program is a must. This approach was coordinated by Call Center leadership and UI Performs staff. Not only did we see an improvement in timely payments, but also the quality of the cases increased. During FY 2024 we will continue with this strategy and continue to monitor its effectiveness.

While continuing to work toward replacing our system, DUA is committed to using our current system as is. We will continue to utilize our data collecting tools to better track and forecast issue creation vs issue resolution. Collecting this information and using it to drive our next steps will be critical in our success to meet these metrics.

Conducting business process analysis in key areas, reviewing, and improving staff training, and working with outside resources have become a daily practice for us. We will continue with these efforts in the upcoming year as we continue to prioritize the timely and accurate payment of benefits to eligible claimants.

Detection of Recoverable Overpayments (Detect Benefit Overpayments)

Target: Overpayments established at a rate that is at least 57.5 percent of the estimated detectable, recoverable overpayments.

As part of our Improper Payment Reduction Plan, the NASWA Integrity Center delivered over twenty recommendations to improve our UI program, including reducing overpayments. As part of this engagement, we worked with a Behavioral Insights vendor. Current behavioral intervention recommendations under discussion include claimant email reminders about weekly work search requirements, tailored advice on earnings requirements, and emphasizing work search requirements and engagement with material in our claimant guide. These are updates we would like to make and hope to do so in the new year if our workload allows. In August of 2023 the Integrity Center (IDH) came to Massachusetts per MDUA's request to work with Program Integrity staff to advise how MDUA can better leverage the IDH and its capabilities. Based off this review, MDUA has submitted several changes to the way data is transferred and processed between the IDH and MDUA's current UI online system. MDUA continues to add users to the IDH to continues to train users on the software and service. MDUA Program Integrity director and several PI supervisors will attend the NASWA Integrity Symposium in December of 2023.

Percent of Employer Tax Liability Determinations Made Timely (Establish Tax Accounts Promptly)

Target: 90 percent of status determinations for new employers will be made within 90 days of the end of the first quarter in which liability occurred.

Massachusetts has steadily improved on this measure since 2020. The 2022 records show that 84.7% of the new status determinations were made within 90 days, an 8-percentage point increase from 2021. Employers registered their accounts in the legacy system, UI Online, and were issued a tax liability determination at the time of registration, provided they indicate that they have met the thresholds for tax liability. If the employer indicated that they did not meet the threshold at the time of registration, they did not receive a determination of liability at the time of registration. Once the employer submitted wages, and provided notification that they have met the threshold, a liability determination was issued. In the event an employer did not provide notification, a quarterly review of all non-labile accounts that submitted wages was manually completed by staff and determinations issued to those accounts that met the threshold. Massachusetts introduced a monthly review of non-labile accounts that have submitted wages and issue determinations to those accounts that have met the liability threshold. This strategy proved successful and increased our timely 90-day determinations from 76.4% in 2021 to 84.7% in 2022.

Massachusetts aimed to continue to maximize automated system validation of Employer Liability Determinations post registration in our legacy system. However, Revenue had just completed an overhaul of the Collections and Enforcement module and the UI online system was at end of life. Therefore, instead of focusing resources on improving an outdated system, Massachusetts focused on the design, testing and implementation of its modernized UI system, Unemployment Services for Employers.

In EMT, employers register their accounts and are issued a tax liability determination at the time of registration. If the employer indicates that they did not meet the threshold at the time of registration, they do not receive a determination of liability. Once the employer submits wages, and provides notification that they have met the threshold, a liability determination will be issued by staff. We configured the same report in EMT that successfully improved our timeliness determinations in our legacy system. Additionally, EMT has increased accuracy in data and on-demand reporting capabilities that facilitates faster identification, review, and redetermination of accounts. We have also configured EMT with more access and wage reporting controls on inactive or terminated accounts. Our legacy system allowed wage reporting on terminated employers, enabling employers that should receive a new tax liability determination to resume filing without notifying the agency. In EMT, employers and third parties cannot file on terminated accounts, but are instead prompted to reinstate their accounts with MA DUA and receive a Tax Liability Determination. Massachusetts continues to explore enhancing automation in EMT to further increase our timely issuance of status determinations.

Core Measures

Effective Audit Measure-

C.
N/A

Program Review Deficiencies

D.
N/A

Program Deficiencies

E.

Reporting Deficiencies

During FY 2023, a number of reports were submitted past their due dates for a variety of reasons. We recognize the importance of timely and accurate reporting, and, as such, have performed a review to ensure that all reports have either been submitted or are imminent. The SWA experienced difficulties with SUN server not accepting data as far back as July 2022. Consistent work with the USDOL Hotline resolved the issues and/or created work arounds resulting in late submissions. After degrading for a year, the SUN server was replaced. The server was unavailable for use sporadically through the year and for four full weeks May through July 2023. MDUA has returned to timely submission post SUN fixes.

The Executive Office of Labor and Workforce Development (EOLWD) working with DUA and various partners, performed an assessment of the federal unemployment program introduced in early 2020, the related extension programs, and Unemployment Insurance (UI) benefit payments and the ETA 2112. The benefit charges reported on the ETA 2112 are being revised. Until these revisions are complete, the ETA 204s for 2022 and 2023 cannot be submitted to DOL. MDUA continues to work with EOLWD to enhance the shared service finance system. EOLWD has made recent investments in resources that directly impact our federal grant management reporting.

F. Customer Service Surveys
(optional)
N/A

G. Other (e.g., approach to
maintaining solvency, requests for technical assistance)

H. Assurances:
Assurance of Equal Opportunity (EO).
Assurance of Administrative Requirements and Allowable Cost Standards.
Assurance of Management Systems, Reporting, and Recordkeeping.
Assurance of Program Quality.
Assurance on Use of Unobligated Funds.
Assurance of Prohibition of Lobbying Costs (29 CFR Part 93).
Drug-Free Workplace (29 CFR Part 98).

Assurance of Contingency Planning.

Provide the most recent dates for the following:

Information Technology (IT) Contingency Plan Implemented: February 21, 2023

IT Contingency Plan Reviewed/Updated :
February 21, 2023

IT Contingency Plan Tested:
November 1, 2023

Assurance of Conformity and Compliance.

Assurance of Automated Information Systems Security.

Provide the most recent dates for the following:

Risk Assessment Conducted: December 16, 2020

System Security Plan Reviewed/Updated: May 2021

Assurance of Confidentiality

Assurance of Disaster Unemployment Assistance

Conducted Annual DUA Training for DUA Staff

X Yes ☐ No

Provide the date of the training:

10/13/2023

Developed and/or Maintained a Standard Operating Procedures for use during a major disaster declaration

☐ Yes ☐ No (IN PROCESS)

Massachusetts is in the process of developing the required Standard Operating Procedures; it is expected to be completed by the end of the next quarter.

Public reporting burden for this collection of information is estimated to average 4 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Labor, Office of Unemployment Insurance, Room S-4231, 200 Constitution Ave., NW, Washington, DC, 20210

At a minimum, an IT Contingency Plan must be reviewed and/or updated annually.

At a minimum, an IT Contingency Plan must be tested annually.

At a minimum, a System Security Plan must be reviewed and/or updated annually.

SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM (SCSEP)

The Executive Office of Elder Affairs (EOEA) administers the Senior Community Service Employment Program (MA-SCSEP) in multiple counties across Massachusetts, including Berkshire, Essex, Middlesex, Hampden, Plymouth, Suffolk, and Worcester. EOEA collaborates as a key partner within the MassHire system and works closely with the National SCSEP Grantees and their sub-grantees.

MA-SCSEP program is aligned with the dual objectives set forth in the Older Americans' Act:

- To empower older low-income job seekers, enabling them to acquire the skills and self-assurance necessary to secure unsubsidized employment and attain financial self-sufficiency, thereby enhancing their overall quality of life.
- To provide invaluable community service through on-the-job training, serving to bolster an enrollee's self-sufficiency, engagement in meaningful civic service, and fortify local communities.

As we develop the *MA-SCSEP 2024-2028 State Plan*, EOEA has seized the opportunity to adopt a broader, long-term strategic perspective on SCSEP's role within the state. This includes assessing the program's contribution to workforce development and the potential of our established service network for older adults in advancing the interests of older workers within their local economies.

Designated under the leadership of Governor Maura Healey, the Executive Office of Elder Affairs assumes the responsibility for formulating and submitting the *MA-SCSEP State Plan*. This *State Plan* not only offers an avenue for the Commonwealth to establish new partnerships but also to fortify existing ones, create additional employment opportunities, and expand outreach to employers and training facilities throughout the state. It signifies a commitment to enhancing economic opportunities and the well-being of older workers in Massachusetts.

SECTION I. OVERVIEW OF MASSACHUSETTS' ECONOMY AND LABOR MARKET INFORMATION

This section describes the long-term projections for jobs in industries and occupations in the state that are likely to offer employment opportunities for older workers. (20 CFR 641.302(d))

Overall Trends in Massachusetts Economy

Massachusetts has a robust and diverse economy, with strengths in various sectors such as technology, health care, finance, and education. It is home to numerous prestigious universities and research institutions, which contribute to innovation and knowledge-based industries.

Technology and Innovation: The Greater Boston area, including Cambridge, is a global hub for technology and innovation. It has a vibrant startup scene, and it is known for its concentration of biotechnology and life sciences companies.

Health care and Life Sciences: Massachusetts is a leader in the health care and life sciences sector. The state hosts renowned hospitals, research institutions, and pharmaceutical companies. Biotech clusters in the Greater Boston area are significant drivers of economic growth.

Education: The state's higher education institutions, including the University of Massachusetts, Harvard University, Massachusetts Institute of Technology, and many others, contribute to its economy through research, technology transfer, and a highly-skilled workforce.

Financial Services: Boston is a financial center in the region. The city has a significant presence of banks, investment firms, and insurance companies.

Housing Costs: Housing costs, particularly in the Greater Boston area, are relatively high. This poses challenges for affordability, especially for the workforce.

Transportation Infrastructure: The state has been investing in its transportation infrastructure, including public transportation and road improvements.

As it is outlined in *Economic Analysis* section of this *State Plan*, “the occupations gaining the newest jobs represent a mix of health care and business and professional occupations, and occupations found in tourism-related industries. The leading occupation adding new jobs is personal care aide (20,529 new jobs). Other health care-related occupations in the top 20 include registered nurse (10,635 new jobs), home health aide (9,810 new jobs) and nursing assistant (3,942). Tourism-related occupations include combined food workers (11,159 new jobs), waiters and waitresses (4,992 new jobs) and restaurant cooks (3,482 new jobs).”

Challenges with Economic Disparities

Within the vibrant economic landscape of Massachusetts, disparities persist, highlighting the stark contrast between the state's overall economic prosperity and the challenges faced by certain segments of its population. Despite the state's strong and diversified economy, it is important to acknowledge that not all residents enjoy equal access to its abundant opportunities. These disparities are particularly evident among the SCSEP-eligible population, a group burdened by unique and formidable barriers to gainful employment.

As of September 2023, Massachusetts boasted a low unemployment rate of 2.6%, a testament to its economic strength. However, beneath this seemingly robust surface, lay a deeper issue. A critical challenge emerged in aligning the skills and abilities of SCSEP enrollees with the ever-evolving demands of the open entry-level positions in Massachusetts' dynamic job market, further exacerbating these disparities.

These disparities are not merely statistical numbers, but they represent the real challenges of individuals seeking meaningful work opportunities in a state with a thriving economy. As of 2021, approximately 24,000 older Massachusetts residents were eligible for SCSEP services, and efforts to bridge the skills capabilities and facilitate successful workforce reintegration for this demographic group have proven to be a crucial and an ongoing endeavor.

While the state's economy thrives, it is imperative that efforts continue to be directed toward addressing these disparities and facilitating a more equitable distribution of economic opportunities, ensuring that all residents, including SCSEP enrollees, can fully benefit from the state's robust economic workforce.

SECTION II. OLDER WORKERS AND MA-SCSEP

This section discusses the needs of mature workers, MA-SCSEP enrollees and the localities with the most need for SCSEP services.

The chart below shows the projected Massachusetts' population by age group based on 2020-2050 values from the Massachusetts Department of Economic Research. The numbers of people aged 55 – 74 is expected to remain at 23% of the population in Massachusetts through 2050.

Age	2020	2025	2030	2035	2040	2045	2050

0-54	4,873,754	4,786,640	4,792,216	4,817,872	4,811,937	4,782,98	4,742,012
55-74	1,655,683	1,720,858	1,697,693	1,616,451	1,570,300	1,592,987	1,656,397
75+	502,516	601,124	707,467	810,647	882,885	897,778	871,602
	7,031,953	7,108,622	7,197,376	7,244,970	7,265,122	7,273,754	7,270,011

The map below shows the localities within Massachusetts with the highest concentration of individuals in the 65 to 74 age groups among all people aged 65 and over.

MA-SCSEP enrollees characteristics

Currently demographic data for MA-SCSEP enrollees indicate that enrollees are primarily female, between 55-64 years of age, with a High School diploma or 1-3 years of college.

Barriers to Employment

Current Enrollees have significant barriers to employment. Among these barriers, approximately 90% of individuals experiencing challenges in securing employment have a family income at or below the poverty level. Moreover, 89% of individuals face limited employment prospects, whereas 74% of individuals are receiving public assistance 23% struggle with limited English proficiency. Lastly, 14% of individuals are either homeless or at risk of homelessness, underscoring the diverse challenges faced by different segments of the population in attaining employment.

Most enrollees are receiving public benefits; therefore, obtaining full-time employment might reduce or eliminate many important benefits, such as subsidized housing or access to Medicaid. Even if enrollees have access to employment, the hidden costs, such as the cost of transportation to work, or caregiving responsibilities often are challenging to their job retention.

Areas of Greatest Need

The following data is based on the current unemployment rates for Massachusetts, identifies those localities for which projects of the type authorized by Title V are most needed (20 CFR 641.325 (d).) These areas are with the unemployment rate above the state average.

Unemployment Rate for Massachusetts and Labor Areas

Based on the [Massachusetts Labor Market Information,
http://lmi2.detma.org/lmi/map_box.asp](http://lmi2.detma.org/lmi/map_box.asp) the following table indicates current unemployment rates estimated per workforce development area.

Location	Rate
	Sep-23
Massachusetts	2.5
Berkshire County	2.5
Boston	2.6
Bristol County	2.7
Brockton	2.9
Cape & Islands	2.4
Central MA	2.6
Franklin/Hampshire	2.2
Greater Lowell	2.6
Greater New Bedford	3.1
Hampden County	3.1
Lower Merrimack Valley	2.8
Metro North	2.2
Metro South/West	2.2
North Central	2.5
North Shore	2.4
South Shore	2.4

Recent assessments that were conducted for the *State Plan on Aging 2021-2025* have indicated a surge in concerns regarding social isolation, surpassing any previously identified significant areas of concern: transportation, housing, and health care have emerged as major recurring needs among older adults.

The rise in concern regarding social isolation is notably linked to the prevailing pandemic situation. This unparalleled scenario has had a universal impact, profoundly affecting all individuals. The necessity for health and safety-driven distancing measures has particularly heightened the stress and challenges faced by older adults. While isolation has historically been a concern, the need for combating detachment and loneliness has intensified. Although pandemic-induced challenges persist, tools like internet-based activities, such as Zoom, have shown promise in fostering a sense of community. However, it is evident from the data collected that many older adults require training to use and trouble-shoot digital tools.

Housing remains a predominant concern area, echoing the urgent need for more affordable housing and varied senior housing options. Issues around violence, homelessness, drug abuse, and discrimination were highlighted within the community context. Support in mitigating

housing costs, along with assistance for rent, mortgage, utilities, and property taxes, emerged as key necessities. Both renters and homeowners sought tailored support, ranging from roommate matching assistance, maintenance aid, to home repair services, emphasizing their shared aspiration to age in place.

The health care segment encompassed a range of concerns, including pain management, high prescription costs, and limited coverage benefits, specifically in dental and vision care. Challenges related to health insurance inadequacies and barriers in accessing specialized health care services within specific geographic locations were notably prevalent. Chronic disease management and patient-centered wellness were underscored as crucial elements requiring focused attention.

The feedback collected from these interactions highlights vital areas where the SCSEP program can play a pivotal role in addressing the diverse and pressing needs for economic security of older adults in Massachusetts.

SECTION III. LONG-TERM JOB PROJECTIONS AND MA-SCSEP

This section describes current and projected employment opportunities in the state, the types of skills possessed by eligible SCSEP individuals, and how the long-term job projections relate to the types of unsubsidized jobs for which SCSEP enrollees will be trained and the types of skill training to be provided. (20 CFR 641.302(d)(20 CFR 641.325(c).)

Projected employment opportunities in the state

The table below shows the top five job categories that do not require any formal education and have the largest current and projected number of openings.

Title	Employment 2026	Annual Openings	2018 Mean Annual OES Wage
Retail Salespersons	133,216	19,100	\$30,290
Personal Care Aides	97,330	14,236	\$29,080
Combined Food Preparation and Serving Workers	73,668	13,451	\$26,840
Waiters and Waitresses	69,024	12,968	\$31,920
Cashiers	66,624	12,352	\$26,310

Unsubsidized job placements

The long-term job projections in Massachusetts pose a substantial challenge for MA-SCSEP. Many enrollees within the program are confronting multiple obstacles in their pursuit of employment, particularly in a highly competitive labor market. A significant portion of MA-SCSEP enrollees aim for and secure entry-level positions. However, a considerable number of enrollees secure low-wage jobs primarily within their most recent Host Agency. This reality

underscores the effectiveness of the SCSEP model in assisting older job seekers with limited skills. Yet, projected job openings in for-profit businesses might present greater challenges, largely due to the skills demands associated with such positions.

EOEA remains committed to continually evaluating the skills and job preferences of MA-SCSEP enrollees, focusing on specific occupations and skill training pathways to better align their capabilities with available employment opportunities.

MA-SCSEP Enrollees' Employment Histories and Skills

The enrollees in MA-SCSEP showcase diverse skill profiles and encounter various barriers to employment. Before enrolling in the program, many individuals experience extended gaps in their work history, spanning two to three years. Several enrollees have outdated job skills, while others face challenges due to presumed age discrimination, physical limitations, and limited transportation options. This hinders their job search. Additionally, computer illiteracy and educational constraints remain major obstacles to employment prospects.

Based on feedback from enrollees, the skill profiles of enrollees indicate a range of needs and aspirations:

- Some enrollees exhibit low computer literacy, necessitating fundamental training in using basic software like Microsoft, Outlook and Zoom.
- Individuals previously engaged in labor-intensive industries, such as construction or production, often face physical limitations that prevent them from undertaking demanding tasks, a pre-requisite for such jobs.
- The employment goals of MA-SCSEP enrollees commonly revolve around entry-level positions, including roles like receptionist, file clerk, cashier, maintenance worker, customer service representative, salesclerk, and food preparer/server.
- To compete in the current job market, most enrollees require skills training, either to acquire new competencies or update existing ones.
- Those with mental health care needs frequently encounter challenges in obtaining unsubsidized employment and often secure only subsidized roles within their Host Agencies.
- In areas outside of Boston, access to public transportation poses barriers, limiting the prospects for unsubsidized placements outside of their neighborhood or within walking distance.

The skills possessed by MA-SCSEP enrollees may not completely align with current and projected employment opportunities. Nevertheless, there are sectors where enrollees can leverage their current skills or enter occupations that do not mandate more than a high school or associate degree. For instance, in the health care industry, growing roles like Home Health Aide (HHA) and community health worker do not necessitate a bachelor's degree, providing opportunities for those with varied skill sets and educational backgrounds. Due to the impact of

COVID-19, several indicators within the job market have developed significant shifts. The Massachusetts Senior Community Service Employment Program (MA-SCSEP) faces altered dynamics because of the pandemic's influence on job availability, economic conditions, and employment preferences. Most notably, the preferences of SCSEP enrollees have evolved in response to the pandemic. There has been a noticeable trend among many enrollees who exhibit a reduced interest in pursuing roles within health care and direct care areas, a notable departure from previous goals.

Moreover, the pandemic has transformed the job landscape, amplifying the challenges faced by SCSEP individuals. The economic downturn and changes in labor market demands have intensified the hurdles for older job seekers, creating an increased difficulty in securing suitable employment. The shift in occupational preferences away from health care-related roles further adds complexity to the task of aligning enrollees' skills with the evolving job market, especially within industries heavily impacted by the pandemic.

As a result of these shifting dynamics, the focus of EOEA for the MA-SCSEP program continues to adapt and navigate these changes. The emphasis is now placed on comprehensively evaluating enrollee skills and interests while redirecting training and placement efforts to better match the modified job landscape affected by the pandemic.

Possible SCSEP occupations and skill training

Proposing an innovative approach to SCSEP training involves a dynamic reformation strategy. Our model aims to collaborate closely with hiring employers to gain a comprehensive understanding of actual job openings and the specific skill sets prerequisite for these roles. This entails a proactive reassessment of the skill profile of program enrollees, identifying the gaps between the current skill set and the employer-validated requirements. To bridge these gaps, a hybrid training model will be implemented, encompassing a blend of classroom-based learning and practical community assignment components. This multifaceted training approach aims to address both theoretical knowledge and hands-on practical skills, tailored to meet the precise demands of the identified job opportunities.

Simultaneously, EOEA recognizes the significance of person-centered support services. The agency model prioritizes supplementary services, such as resume critique, interview preparation, and other targeted job development services. These supportive measures are designed to fortify and complement the skill development process, ensuring that program enrollees are not only equipped with the essential technical expertise but are also well-prepared to navigate the intricacies of the job search process. By intertwining employer-based insights, customized training initiatives, and comprehensive job development services, the approach aims to create a highly effective and tailored framework that optimally prepares SCSEP enrollees for successful placement and sustainable employment in the workforce. EOEA will continue to work with enrollees to:

1. Identify most likely jobs and training or certificate needed.

2. Identify low-cost training providers.
3. Identify interested enrollees and place them into the relevant training.
4. Increase On-the-Job training assignments with for-profit employers based on the specific job requirements.

Given the educational and work experience of MA-SCSEP enrollees, and the projected occupational growth, most likely unsubsidized jobs will be entry-level positions. Below are some occupational areas that might hold promise for MA-SCSEP enrollees based on their skill sets, the current job market, and potential employment opportunities:

- Customer Service Representative: Enrollees often possess valuable initial skills, such as communication and interpersonal abilities, making them suitable for customer service roles. Training in handling inquiries, resolving issues, and managing customer interactions could prepare them for such positions.
- Administrative Assistant or Office Support: Enrollees might have organizational skills and experience that align with administrative tasks. Training in office software, file management, and clerical duties can enhance their potential in these roles.
- Retail Associate or Salesclerk: With prior experience in various industries, enrollees might advance in retail environments by training in product knowledge, sales techniques, and customer interaction that can be beneficial for such positions.
- Food Service Worker: Given the experience and skills in service and food preparation, roles in the food industry, such as a server or food preparer, could be potential avenues for employment. Training in food handling, safety, and customer service may be beneficial.
- Maintenance Worker or Janitorial/Environmental Staff: Enrollees with experience in labor or construction could be suited for maintenance or janitorial roles. Training in facility upkeep, safety standards, and equipment operation could enhance their employability in these areas.
- Receptionist or Front Desk Coordinator: Training in administrative tasks, phone etiquette, and multitasking could prepare enrollees for roles at the front desk or reception areas, utilizing their communication and organizational skills.

These occupations cater to various skill sets and offer potential job opportunities for MA-SCSEP enrollees. Training programs aligned with the specific requirements of these roles can enhance their employability and readiness for unsubsidized employment.

SECTION IV. MA-SCSEP COORDINATION PLAN WITH WIOA AND JOB TRAINING INITIATIVES

This section describes the coordination plan for MA-SCSEP with WIOA, One-Stop Career Centers (OSCCs) and other labor market and job training initiatives. (20 CFR 641.302(g), 641.325(e))

The planned actions to coordinate activities of SCSEP grantees with WIA title I programs, including plans for using the WIOA One-Stop delivery system and its partners to serve individuals aged 55 and older are outlined. (20 CFR 641.302(g), 641.325(e))

The actions to ensure that SCSEP is an active partner in the One-Stop delivery system and the steps the state will take to encourage and improve coordination with the One-Stop delivery system are described. (20 CFR 641.335)

Coordination with MassHire State and 16 Regional Workforce Boards

Since 2016 EOEA has been working closely with the MassHire System to raise awareness of mature workers' job needs and the capacity of the MA-SCSEP to train and place qualified workers. EOEA will continue to work closely with MassHire and all WIOA partners to address the needs of mature workers in the state.

Phase One, 2024-2025

EOEA collaborates with the MassHire system to implement robust strategies aiming to connect the older workforce with businesses seeking skilled individuals. This includes expanding outreach efforts through aging services organizations within their network. A pivotal aspect of this collaboration involves partnering with MassHire BizWorks to engage local employers, emphasizing the retention and recruitment of mature individuals. MassHire BizWorks offers comprehensive resources and connections to statewide networks supporting business growth and sustainability.

The joint effort between EOEA and MassHire BizWorks will focus on assisting businesses to:

- Recruit and welcome mature workers into their workforce.
- Explore and potentially adopt alternative work arrangements and phased retirement programs to attract and retain mature talent.
- Share feedback with the public workforce investment system regarding the quality of referrals and services offered by the local MassHire OSCC.

Additionally, working in tandem with local MassHire Boards and One Stop Career Centers aims to accomplish several key objectives:

- Boost the percentage of older job seekers accessing training opportunities.
- Enhance job attainment following training initiatives.

- Expand job development and coaching services for individuals aged 55 and older.
- Increase referrals to external agencies capable of aiding in overcoming obstacles to employment, such as the Family Caregiver Program and Lifespan Respite Coalition.
- Amplify the utilization of Person-Centered Planning methods, including practices like Motivational Interviewing and coaching.
- Develop effective referral systems for placement into volunteer opportunities.

A critical element involves designating front-line staff, specifically older workers, to provide personalized services to older job seekers, ensuring their unique needs are addressed. Monitoring the performance of local MassHire Career Centers will be key in tracking the placement rates of mature workers into suitable jobs.

EOEA aims to measure the achievement of these goals by collecting vital data, including:

- Accessing customer and employer surveys conducted by MassHire to determine the benefits of working with the program.
- Utilizing Department of Labor statistics as job attainment and retention rates, along with median earnings to assess progress.
- Analyzing the duration of unemployment among older job seekers.

Furthermore, EOEA remains agile in response to performance findings, developing new strategies as needed. These adaptations are subsequently integrated into local Memoranda of Understanding (MOUs) and other planning initiatives to ensure the continuous improvement and efficacy of the program.

Coordination with MassHire State Workforce Board:

The Massachusetts MassHire Workforce Board advises the Governor on continuously improving the Massachusetts Workforce Development system. EOEA participates in all MassHire Board meetings and frequently presents on SCSEP.

Alongside the collaboration with the MassHire system, the EOEA acknowledges the shift away from the previous subgrantee model to enroll consumers to an in-house program based single streamlined process. The objective is to outline and harmonize customer service strategies while promoting cohesive efforts between EOEA and the local Workforce Development Boards. Through these MOUs, specific policies and guidelines will be articulated, ensuring a unified and streamlined approach in addressing the needs of shared customers, particularly older job seekers.

The development of these *MOUs* signifies a strategic move to foster a synergistic relationship between EOEA and the State and local WDBs. The goal is to align efforts, enhance service delivery, and create a cohesive environment for effective and unified customer service policies.

Coordination with MassHire One Stop Career Centers (OSCCs)

EOEA explores strategies that enhance the availability of new and pertinent job placements for MA-SCSEP enrollees.

First Year:

- Conduct a comprehensive statewide assessment of employers and job openings within Food Preparation and Serving, Building and Grounds Cleaning and Maintenance, and Health care support occupations.
- Engage local employers from these sectors to gain information on their workforce requirements and devise pathways for MA-SCSEP enrollees to secure unsubsidized placements with these employers.
- Continual review and revision of the job interests of current MA-SCSEP enrollees and evaluate the skills required for jobs within these targeted industries.
- Assess Host Agency assignments to optimize the effectiveness of skills training provided to meet the needs of MA-SCSEP enrollees.
- Pilot job readiness training programs utilizing training materials developed by EOEA in 2022 and funded through a federal demonstration grant.

Second Year:

- Evaluate the success of the pilot skills training programs.
- Assess the benefits of extending the training to other regions across the state.

Third and Fourth Years:

- Continue analyzing the effectiveness of skill training and job placement rates for MA-SCSEP enrollees.
- Develop additional occupational training programs tailored to specific needs.

Coordination with other labor market and job training initiatives (20 CFR 641.302(j))

EOEA will effectively coordinate with various labor market and job training initiatives by fostering strategic partnerships and collaborative efforts. This can be achieved through active engagement with relevant stakeholders, such as local workforce development boards, One-Stop Career Centers, and other key agencies involved in employment and training programs. By establishing communication channels and cooperative agreements, EOEA can align the goals and activities of SCSEP with the broader spectrum of job training initiatives.

Additionally, EOEA can facilitate joint planning and information exchange sessions with partnering agencies to harmonize services, share best practices, and avoid redundant efforts. Utilizing a comprehensive approach, EOEA can contribute valuable insights and expertise garnered through SCSEP to inform and enhance the broader job training landscape. Such

collaboration ensures a more cohesive, streamlined, and impactful delivery of services aimed at supporting older job seekers in Massachusetts, ensuring that they benefit from a network of well-coordinated resources and opportunities.

SECTION V. MA-SCSEP COORDINATION WITH OTHER PROGRAMS

This section will describe the actions to coordinate MA-SCSEP with grantees and the activities being carried out in the state under the other titles of the Older Americans Act (OAA). (20 CFR 641.302(h))

AAAs and ASAPs

EOEA will persist in its collaboration with Area Agencies on Aging (AAAs), Aging Services Access Points (ASAPs), and other service providers to streamline access to a comprehensive range of social services. MA-SCSEP supports enrollees by connecting them to local AAAs and ASAPs' Information and Referral (I&R) specialists, caregiver specialists, and the health insurance counseling program called SHIP (SHINE) Program. The goal is to ensure that enrollees are well-informed about the diverse opportunities available through the EOEA network that will optimize their limited pre-employment income sources. Moreover, this referral system aims to assist individuals in leveraging various older adult network services to assist enrollees in overcoming barriers that hinder their pathway to unsubsidized employment.

The State Health Insurance Assistance Program: Serving Health Information needs of everyone on Medicare (SHINE) Program

During the COVID-19 pandemic, EOEA exemplified effective collaboration with the State Health Insurance Assistance Program (SHINE) by integrating SCSEP enrollees into the SHINE program's operations. These enrollees received specialized training to support online SHINE counselors during the open enrollment period. Their assistance was pivotal in guiding individuals through the complexities of health insurance and Medicare options during a critical time when in-person interactions were limited, and contact data needed to be recorded.

Furthermore, SCSEP enrollees were actively involved in conducting customer satisfaction surveys, aiding in collecting valuable feedback to enhance the quality and effectiveness of SHINE services. The success of this collaborative effort between EOEA and the SHINE program during a challenging period demonstrated the potential for SCSEP enrollees to contribute meaningfully to essential community services. As the need arises again, there is an opportunity to replicate this successful collaboration, leveraging the skills and dedication of SCSEP enrollees to support the SHINE program in assisting individuals during crucial enrollment periods.

Family Caregiver Support Program

Integrating the Family Caregiver Support Program (FCSP) with the core SCSEP and other statewide workforce development services offers a unique opportunity to create a more comprehensive and supportive network for older individuals seeking employment. One method of integration involves incorporating caregiver support services within the broader array of workforce development initiatives. This could entail offering specialized counseling or guidance

for SCSEP enrollees who are family caregivers by providing them the resources and information to balance caregiving responsibilities with their job-seeking efforts.

Moreover, the integration can involve collaborative partnerships and shared referrals between FCSP and SCSEP service providers. By fostering communication channels between these programs, caregivers involved in SCSEP can access additional assistance, respite services, or support groups offered through the FCSP. Additionally, expanding the range of supportive services available through the collaboration between FCSP and SCSEP can enhance the overall well-being of enrollees, aiding them in their dual roles as caregivers and job seekers. This integration can be further strengthened through joint training sessions or workshops that cater to the specific needs and challenges faced by individuals juggling caregiving responsibilities while seeking employment.

Educating employers that are customers of the state's workforce development system about caregiver programs and resources available can further enrich this integrated approach. Employers, when informed about caregiver support services like FCSP, can offer workplace support or accommodations that acknowledge and assist enrollees who are also caregivers. Providing insights into the challenges faced by individuals balancing employment with caregiving responsibilities can empower employers to create a more empathetic and inclusive work environment. This educational outreach can be instrumental in creating an environment where caregivers feel valued and supported in both their caregiving roles and their professional endeavors.

Options Counseling

Options Counseling is a gateway for many Massachusetts elders and people with disabilities to receive community supports and services. Launched throughout the Commonwealth in 2010, Options Counseling provides residents with objective information about long-term services and supports that can make the difference between people remaining in their homes -- or other preferred residential setting -- or placement in a nursing facility.

The program ensures that older adults and people with disabilities can consider long-term support options at a variety of points in the planning process, not just prior to nursing facility admission. The timing and the number of counseling sessions provided depend on a consumer's individual need for information and decision-making support.

Options Counseling service is accessible through the Commonwealth's eleven Aging and Disability Resources Consortia (ADRCs). The counselors are located at ASAPs and Independent Living Center (ILCs).

Aging and Disability Resource Consortia (ADRCs) and Options Counseling (OC) services offer a spectrum of tailored support and resources that can greatly benefit SCSEP enrollees facing significant obstacles in finding and maintaining employment. These specialized services can specifically provide:

- **Tailored Counseling and Information:** ADRCs and OCs offer personalized counseling sessions to address the unique needs and circumstances of SCSEP enrollees. These sessions provide objective and comprehensive information about long-term services and support options. For SCSEP enrollees, this could include guidance on available support services, respite care, and assistance programs tailored to their specific caregiving responsibilities or challenges.
- **Navigational Support:** ADRCs and OCs help SCSEP enrollees navigate complex service systems by guiding them through available resources and programs that align with their individual needs. They offer detailed information on support options that facilitate the balancing of caregiving duties while seeking employment, helping enrollees make informed decisions about their career and caregiving pathways.
- **Training and Guidance:** ADRCs and OCs can provide training and workshops tailored to the needs of SCSEP enrollees, offering insights into managing caregiving responsibilities alongside employment, stress management techniques, and strategies for maintaining a healthy work-life balance.

By availing themselves of the support and resources provided by ADRCs and OCs, SCSEP enrollees can benefit from a person center holistic approach that recognizes and supports their dual roles as job seekers and caregivers. These services offer invaluable guidance and connections that can contribute to a more supportive and inclusive work environment for individuals facing these challenges.

SECTION VI. COORDINATION OF MA-SCSEP WITH OTHER PRIVATE AND PUBLIC ENTITIES AND PROGRAMS

This section will outline the work that EOEA does with a variety of private and public entities and programs that provide services to older Americans and programs for those with special needs or disabilities. (20 CFR 641.302(i))

National SCSEP Grantees

EOEA collaborates with the National Grantees partners that include Operation ABLE and Senior Service America Inc.

As the state SCSEP administrator, the Executive Office of Elder Affairs continues to:

- Negotiate the slot exchanges in selected counties if needed.
- Develop an annual equitable distribution of slots and the State Coordination Plan.
- Promote collaboration with MassHire One-Stop Delivery System and the recognition and promotion of mature workers state-wide.
- Coordinate the management of the respective SCSEP resources to the maximum benefit of enrollees, including enrollee transfer when approved by the Department of Labor.
- Work together to increase efficiency and efficacy of the mutual sub-recipients.
- Refer SCSEP applicants for aging and employment services to local providers.

- Continue partnering on special projects such as job fairs, training, workshops, and conferences benefiting older workers especially where sub-recipients are shared.
- Host quarterly SCSEP meetings for all SCSEP providers to share “best practices” and enhance a coordinated approach to serving all SCSEP enrollees in the Commonwealth.
- Provide National Grantees with technical assistance on the broader needs of older workers.

Coordination with Councils on Aging

The Executive Office of Elder Affairs (EOEA) remains committed to ongoing collaboration with other statewide networks dedicated to supporting older job seekers. An example of such collaboration is with the Massachusetts Association of Councils on Aging (MCOA), which administers the Job Search Skills Training Program specifically designed for unemployed individuals aged 55 and older. EOEA has established a successful history of partnership with this program, spanning the last four years.

This collaboration has facilitated various shared initiatives between SCSEP and the Job Search Skills Training Program. Among these initiatives were joint efforts to assist mutual customers, engage with local employers, and foster awareness of available slots within the SCSEP program. Additionally, EOEA has actively promoted the SCSEP program through these collaborations, leveraging the partnership to amplify outreach efforts and inform eligible individuals about the opportunities and resources offered through SCSEP.

EOEA will continue recruiting individual Councils on Aging (COAs) to serve as Host Agencies for SCSEP enrollees. In addition to this recruitment, the agency will leverage computer labs to provide a valuable resource for enrollees seeking to enhance their technological proficiency and computer knowledge. By utilizing the computer labs available at these COAs, they can offer enrollees access to technology, supporting their learning and skill development in this crucial area. This initiative aligns with EOEA’s commitment to ensuring that enrollees have access to the necessary tools and resources to improve their technological literacy, a vital aspect in today’s job market requirements.

Section VII. Employer engagement

This section will outline the state’s long-term strategy for engaging employers to develop and promote opportunities for the placement of SCSEP enrollees in unsubsidized employment. (20 CFR 641.302(e))

EOEA has been working with the MassHire initiatives to reach out and recruit local employers. There have been several distinct ways to partner with Business Service Representatives, or Market Makers to work with employers to find qualified new hires through OSCCs system.

State Long-Term Employer Engagement Strategy for SCSEP Enrollees' Unsubsidized Employment Placement includes the following main strategies.

Employer Outreach and Engagement:

- Partnerships: Develop and strengthen collaborations with local businesses, industry associations, and chambers of commerce to foster employer engagement.
- Information Sharing: Regularly disseminate information about SCSEP and its benefits to employers, highlighting the advantages of hiring older workers.
- Tailored Approaches: Customize outreach strategies based on the needs and preferences of different industry sectors and employer sizes.
- Workforce Development Collaborations: Coordinate with local workforce development boards, career centers, and economic development agencies to promote SCSEP opportunities.

Employer Education and Support:

- Training Initiatives: Offer resources and workshops to employers to educate them on the benefits of hiring older workers, address age-related stereotypes, and enhance workplace inclusivity.
- Support Services: Provide guidance on integrating SCSEP enrollees into the workforce, including assistance with onboarding, workplace accommodations, and leveraging their skills and experiences.
- Incentive Awareness: Inform employers about potential financial incentives, tax credits, and other benefits available for hiring SCSEP enrollees.

Job Matching and Placement:

- Job Listings: Actively work with employers to identify and list available positions suitable for SCSEP enrollees, focusing on entry-level opportunities.
- Recruitment Events: Host job fairs, recruitment drives, or employer-specific events aimed at connecting SCSEP enrollees with potential employers.
- Individualized Placement Support: Provide tailored placement support by matching the skills and interests of enrollees with available job openings, ensuring a good fit for both parties.

Evaluation and Feedback Loop:

- Monitoring Progress: Regularly assess and track the success of employer engagement efforts, measuring the number of enrollees placed in unsubsidized employment.
- Feedback Collection: Gather feedback from both employers and SCSEP enrollees about their experiences and challenges while using this information to continually refine and improve employer engagement strategies.
- Continuous Improvement: Use collected data and feedback to adapt and enhance engagement strategies, ensuring ongoing improvement and effectiveness in securing job opportunities for SCSEP enrollees.

The state's long-term strategy is focused on fostering strong, sustainable relationships with employers, educating them about the benefits of hiring SCSEP enrollees, and facilitating job placements in unsubsidized employment, thereby advancing opportunities for older workers within the workforce.

SECTION VIII. EQUITABLE DISTRIBUTION STRATEGY

This section will describe the state's long-term strategy for achieving an equitable distribution of SCSEP positions within the state.

The state is committed to achieving an equitable distribution of SCSEP positions and meet the needs of the diverse older individuals across the state. The following strategies will be used in the next 4 years to achieve maximum equity within the scope of SCSEP resources.

1. **Leverage Partnerships and Collaboration:** Collaborate with local community organizations, non-profits, and government agencies to share resources and align efforts. Pooling resources and expertise can extend the reach and impact of the program without significant additional costs.
2. **Maximize Technology and Online Resources:** Utilize technology for efficient data collection, analysis, and reporting. Online tools, virtual meetings, and data management systems can streamline operations, reducing the need for extensive travel or manpower.
3. **Strategic Targeting of Efforts:** Focus efforts on areas of high need identified through data analysis. Concentrate resources in regions where the demographic concentration of eligible individuals is high, ensuring maximum impact within limited resources.
4. **Streamline Processes and Documentation:** Develop streamlined processes and standardized documentation to minimize administrative burdens. This will help to optimize the use of limited human resources by reducing time spent on administrative tasks.
5. **Adaptive Monitoring and Evaluation:** Implement adaptive monitoring and evaluation systems to continuously track and adjust strategies. This ensures that the approach remains aligned with changing needs, allowing for immediate redirection of resources if necessary.
6. **Internship Programs:** Utilize internships to augment human resources. Engaging students in data analysis, outreach, or administrative support can provide additional hands without significant financial investment.
7. **Training and Capacity Building:** Provide targeted training to WIOA partner agencies, host agencies, and supervisors to enhance their capabilities in managing SCSEP positions efficiently and effectively.

By applying these strategies, EOEA can effectively navigate the challenges posed by limited resources and budget constraints while ensuring an equitable distribution of SCSEP positions and addressing the diverse needs of eligible individuals.

The relative distribution of SCSEP eligible individuals

Table 10 shows a profile of Massachusetts General Population the distribution of eligible individuals who are priority service as provided under the Older Americans' Act, section 518(b): the relative distribution of—“(i) eligible individuals who are individuals with greatest economic need;“(ii) eligible individuals who are minority individuals; and“(iii) eligible individuals who are individuals with greatest social need;

Chart 10. Massachusetts: Profile of General Population 2010.
(Based on the U.S. Census Bureau)

Total Population	6,789,319	100.0%
55 - 64 Years	901,717	13.3%
65 - 84 Years	894,411	13.2%
85+ Years	155,340	2.3%
Veteran Status		
Civilian Population 18+ Years	5,075,535	
Civilian Veterans	325,299	6.4%
Disability Status of the Civilian		
Total Civilian Non-institutionalized	6,713,702	
With a Disability	781,740	11.6%
Population 18 - 64 Years	4,321,499	
With a Disability	389,450	9.0%
Population 65+ Years	1,012,172	
With a Disability	330,631	32.7%
Language Spoken at Home		
Population 5+ Years	6,426,464	
Speaks Only English	4,940,967	76.9%
Language Other Than English	1,485,497	23.1%
Speaks English “Less Than Very Well”	582,948	39.2%
Spanish	564,401	8.8%
Speaks English Less Than “Very Well”	231,354	41.0%

Other Indo-European Languages	562,877	8.8%
Speaks English Less Than “Very Well”	196,256	34.9%
Asian & Pacific Islander Languages	267,678	4.2%
Speaks English Less Than “Very Well”	126,622	47.3%
Other Languages	90,541	1.4%
Speaks English Less Than “Very Well”	28,716	31.7%
% of Families & People Whose Income in the Past 12 Months is Below the Poverty Line		
Total Population	727,546	11.1%
Under 18 Years	198,980	14.6%
Related Children Under 18 Years	193,444	14.3%
Related Children Under 5 Years	57,700	16.2%
Related Children Under 5 - 17 Years	141,280	13.6%
Population 18+ Years	528,566	10.2%
18 - 64 Years	437,834	10.5%
65+ Years	90,732	9.0%
People In Families		8.0%

Source U.S. Census Bureau: State and County QuickFacts. Data derived from Population Estimates, American Community Survey, Census of Population and Housing, State and County Housing Unit Estimates, County Business Patterns, non-employer Statistics, Economic Census, Survey of Business Owners, Building Permits, Consolidated Federal Funds Report Last Revised: Thursday, 07-Jun-2012 13:34:52 EDT

EOEA will continue to work with the National Grantees, that include the Senior Service America Inc. and Operation ABLE of Greater Boston to analyze the LMI data, SCSEP population needs, underserved locations in the state, rural and urban areas populations and their specific challenges to obtain and retain the unsubsidized employment.

SECTION IX. SERVICE TO MINORITY AND MOST-IN-NEED OLDER INDIVIDUALS (20 CFR 641.302 (c))

This section describes the strategies to ensure most effective service to minorities and most-in-need older individuals.

The Executive Office of Elder Affairs, through its elder network and partner agencies, serves all residents of the Commonwealth, reaching out to minority communities through local

community service agencies, minority newspapers, and churches. The new immigrant populations in the Commonwealth are mainly Hispanic, Haitian, and Ukrainian.

EOEA will have a plan to provide the following:

Outreach and Inclusive Service Delivery

1. Develop targeted outreach strategies to engage ethnic and underserved communities, ensuring their awareness of SCSEP services. Utilize culturally sensitive and multilingual materials to reach diverse populations effectively.
2. Establish accessible and welcoming service delivery methods, incorporating multilingual communication channels and provisions for individuals with a disability.

Cultural Competency and Sensitivity Training

1. Provide continuous training and resources to SCSEP staff to foster cultural competency, ensuring the ability to understand and cater to the diverse needs of minority and most-in-need older individuals.
2. Develop training programs focusing on cross-cultural understanding, language support, and sensitivity to unique challenges faced by minority and underserved communities.

Tailored Support Services:

1. Implement personalized support services addressing the distinct challenges faced by minority and most-in-need older individuals. This might involve specific job readiness training, language skills enhancement, and cultural orientation for effective workplace integration.
2. Collaborate with local community organizations and ethnic groups to customize assistance services based on the unique requirements and cultural backgrounds of the diverse population

Community Partnerships and Advisory Committees

1. Forge alliances with community groups, faith-based organizations, grocery stores, barber shops, hair salons, and social services agencies to extend the reach of SCSEP services into underserved areas.
2. Form advisory committees comprising representatives from minority and underserved communities to provide feedback on program effectiveness and ensure alignment with the specific needs of these groups.

Monitoring and Evaluation

1. Regularly monitor and evaluate the effectiveness of outreach strategies and service delivery to minority and most-in-need older individuals.
2. Conduct surveys and feedback sessions within these communities to assess the quality and relevance of services offered, using their input to continually refine and enhance SCSEP support.

The outlined plan aims to ensure that SCSEP services are tailored and responsive to the specific needs of minority and most-in-need older individuals, establishing an inclusive and culturally sensitive environment conducive to their successful participation in the program.

In addition to these strategies, EOEA will leverage its on-demand multilanguage translation services for written document translation. This resource will be utilized to update all program materials, OMB forms, and program manuals specifically written for enrollees. By providing these materials in various languages, EOEA aims to ensure that program information and documentation are accessible and comprehensible for enrollees from diverse linguistic backgrounds, fostering a more inclusive and equitable environment for all enrollees.

SECTION X. COMMUNITY SERVICE ASSIGNMENTS

This section describes community service assignments that are needed and the places where these services are most needed.

EOEA will work to define the specific community service roles required and highlight the areas where these services are most needed. These assignments provide SCSEP enrollees with opportunities to contribute meaningfully to their communities while gaining valuable work experience and marketable skills. As part of the strategy, EOEA recognizes the critical role of host agencies in facilitating the successful integration and training of SCSEP enrollees. EOEA will implement an educational initiative targeted at host agencies and supervisors. This initiative targets to teach the fundamental theory of SCSEP, delineating the primary purpose of enrollees' involvement as a learning process aimed at skill development and employment readiness.

Host agencies and supervisors will continue to be educated to understand that the program primarily serves as a training ground for enrollees, enabling them to acquire essential skills and knowledge. Emphasis will be placed on the understanding that enrollees are present to learn and enhance their capabilities, subsequently becoming valuable assets to the agency, rather than solely providing free labor. This educational initiative will clarify the roles and responsibilities of host agencies and supervisors, reinforcing the significance of creating a conducive learning environment for enrollees to thrive and gain necessary skills. With that in mind, EOEA's action plan defines the following main steps:

- **Needs Assessment:** Conduct a comprehensive needs assessment in collaboration with local community stakeholders to identify areas that require support or services where SCSEP enrollees can contribute effectively with their individual development goals.
- **Role Identification:** Define and outline various community service roles that SCSEP enrollees can fulfill, matching their skill sets and interests with the identified community needs.
- **Partner Engagement:** Initiate outreach and engagement with community organizations, fostering partnerships to create diverse and meaningful assignments for SCSEP enrollees.

- **Assignment Development:** Create detailed assignment descriptions, outlining responsibilities, duration, and expected outcomes for each service role in alignment with community needs.
- **Monitoring and Feedback:** Establish a monitoring system to regularly evaluate the effectiveness and impact of community service assignments, gathering feedback from participating organizations and SCSEP enrollees to continually refine and adapt the assignments as needed.

The Community Service Assignments Plan aims to empower SCSEP enrollees to contribute meaningfully to their communities while addressing crucial local needs, fostering a mutually beneficial relationship between the program and the communities it serves.

Year One:

1. **Needs Assessment:** Conduct an extensive needs assessment in collaboration with local community stakeholders to identify areas that require support or services where SCSEP enrollees can effectively contribute. Begin discussions with community partners and stakeholders to outline areas of potential collaboration and service needs.
2. **Role Identification:** Define initial community service roles that SCSEP enrollees can fulfill, considering their skill sets and interests, aligning them with the identified community needs. Begin developing a preliminary outline of potential service roles.

Year Two:

3. **Partner Engagement:** Strengthen engagement with community organizations by establishing formal partnerships, solidifying agreements, and finalizing arrangements for community service assignments. Work collaboratively to create diverse and meaningful assignments for SCSEP enrollees in response to the needs identified in Year One.
4. **Assignment Development:** Create comprehensive and detailed assignment descriptions, outlining responsibilities, duration, and expected outcomes for each service role. Collaborate with partners to finalize assignment plans, ensuring they are tailored to address specific community needs.

Year Three:

5. **Monitoring and Feedback:** Establish a robust monitoring system to evaluate the effectiveness and impact of community service assignments. Gather feedback from participating organizations and SCSEP enrollees to continuously evaluate and refine the assignments. Use this feedback to adapt the assignments as needed, ensuring they remain responsive to community needs and relevant to enrollee development.

The phased approach over the three years of the *State Plan* aims to progressively develop, implement, and refine community service assignments for SCSEP enrollees. The first year focuses on groundwork and needs assessment, the second year on partnership development

and initial assignment creation, and the third year on ongoing monitoring, feedback incorporation, and assignment refinement.

SECTION XI. PROGRAM IMPROVEMENT AND MONITORING

This section describes the state's strategy for continuous improvement in the level of performance for SCSEP enrollees' entry into unsubsidized employment, and to achieve, at a minimum, the levels specified in OAA Section 513(a)(2)(E)(ii). (20 CFR 641.302(f))

The state's strategy emphasizes continuous improvement through setting specific performance benchmarks, statistical monitoring, and adaptive programming, coupled with qualitative insights from surveys and focus groups. This approach aims to facilitate SCSEP enrollees' successful entry into unsubsidized employment, striving to meet or exceed the performance levels stipulated in the OAA Section 513(a)(2)(E)(ii).

1. Performance Benchmarks and Objectives:

Defined Targets: Establish specific targets aligned with the OAA Section 513(a)(2)(E)(ii) to measure and enhance SCSEP enrollees' progression towards securing unsubsidized employment.

Baseline Levels: Set a benchmark and incremental goals to meet or surpass the minimum levels specified in OAA Section 513(a)(2)(E)(ii).

2. Performance Evaluation and Measurement:

Robust Data Collection: Implement a comprehensive data collection method to monitor SCSEP enrollees' advancement towards obtaining unsubsidized employment.

Key Performance Indicators: Regularly track essential metrics, including enrollees placed in unsubsidized employment, job retention rates, wage progression, and job quality indicators.

Supplementary Metrics: Conduct surveys and focus groups to gather qualitative insights and feedback from enrollees, Host Agencies, and employers, enhancing the understanding of performance factors beyond quantitative measures.

3. Continuous Improvement Strategies:

Data Analysis and Feedback: Regularly analyze performance data and qualitative feedback to identify areas for enhancement.

Adaptation and Flexibility: Utilize data insights and feedback to adapt strategies, programs, and support services, aiming to optimize enrollees' employment outcomes.

4. Training and Support Enhancement:

Skill Development: Evaluate and improve training programs to meet the changing demands of the job market, focusing on upskilling enrollees with in-demand skills.

Tailored Support Services: Offer personalized support such as resume enhancement, interview skill training, and individualized job search techniques.

5. Outreach and Collaboration:

Strengthened Partnerships: Enhance relationships with community collaborators, workforce development boards, and industry stakeholders to overcome barriers to unsubsidized employment.

Employer Engagement: Expand efforts to engage employers and highlight the advantages of hiring SCSEP enrollees, thus creating more pathways for sustainable job placements.

6. Periodic Review and Adjustment:

Regular Assessments: Conduct periodic reviews of program strategies and initiatives using statistical analytics and qualitative insights to ensure they remain effective and aligned with set goals.

Strategy Modifications: Adjust and refine program elements based on continuous assessment, data analysis, and qualitative feedback to improve enrollees' success in securing unsubsidized employment.

EOEA incorporates the Problem-Driven Iterative Adaptation (PDIA^{[\[1\]](#)}) Technique, which is a problem-solving approach that encourages continuous learning and adaptation to address complex issues within programs or strategies. PDIA involves breaking down large, complex problems into smaller, more manageable components, enabling experimentation and learning through the process.

PDIA involves a flexible and adaptive approach to problem-solving, focusing on learning from experimentation and adjusting based on the evolving understanding of the problem. This methodology allows for iterative improvements in the strategy while addressing specific challenges and adapting to changing circumstances. EOEA has used this technique in collaborative work with employers and WIOA partners in the past four years.

SECTION XII. THE STATE'S LONG-TERM STRATEGY TO IMPROVE SCSEP SERVICES

This section outlines planned longer-term changes to the design of the program within the state, and planned changes in the use of SCSEP grantees and program operators to better achieve the goals of the program. This may include recommendations to the Department as appropriate. (20 CFR 641.302(k))

In an ongoing effort to improve SCSEP services, EOEA will adopt a more integrated approach, collaborating with MassHire and WIOA partners to establish industry-specific pipelines tailored to the workforce needs identified by local employers. This proactive engagement will involve identifying open positions and the prerequisite skill sets needed from employers, enabling EOEA to provide targeted classroom-based and on-the-job training to better prepare MA-SCSEP enrollees for these specific positions.

1. Emphasis on On-the-Job Experience (OJE)

A primary tactic to engage employers will center on leveraging the On-the-Job Experience (OJE) program, fostering closer connections with local businesses.

2. Focused Employer Engagement

Over the next five years, EOEA's strategic plan involves sustained and concentrated employer outreach, particularly in three key sectors: Food Preparation and Serving, Building and Grounds Cleaning and Maintenance, and Health care Support.

3. 50+ Job Club Training Referral

Facilitating connections with the 50+ Job Club training to link enrollees with tailored resources to enhance their employability.

4. Implementation of Skill Training

To promote continued commitment to the assessment and evaluation of MA-SCSEP enrollees, EOEA will focus on specific occupations and skill training pathways through collaboration with WIOA vendors, community colleges, vocational schools, and other affordable training providers.

5. Augmenting Community Service Assignments

EOEA's strategy includes constant evaluation of 'best practices' and the identification of highly effective Host Agencies providing quality training opportunities or hiring MA-SCSEP enrollees. Additionally, close collaboration with MassHire BizWorks will ensure community service assignments align effectively with employers' needs.

The state's strategy aims to refine SCSEP services through collaborative employer engagement, targeted training, and fine-tuning community service assignments, ensuring better alignment between MA-SCSEP enrollees' skills and the demands of the workforce.

^[1] Andrews, Matthew, Lant Pritchett, and Michael Woolcock. 2017. **Building State Capability: Evidence, Analysis, Action**. Oxford University Press.

SCSEP Assurances

SCSEP ASSURANCES

The <i>State Plan</i> must include assurances that:	
1.	Where SCSEP is included in the <i>Combined Workforce Plan</i> , the State established a written policy and procedure to obtain advice and recommendations on the <i>State Plan</i> from representatives of the State and area agencies on aging; State and local boards under WIOA; public and private nonprofit agencies and organizations providing employment services, including each grantee operating a SCSEP project within the State, except as provided under section 506(a)(3) of OAA and 20 CFR 641.320(b); Social service organizations providing services to older individuals; Grantees under Title III of OAA, Affected Communities, Unemployed older individuals, Community-based organizations serving older individuals; business organizations; and labor organizations.
	The Massachusetts Senior Community Service Employment Program (MA-SCSEP) has been an active member on the Commonwealth's Workforce Innovation and Opportunity Act (WIOA) Steering Committee tasked, in conjunction with the State Board and Governor's office, to participate fully in the development of the <i>Combined State Plan</i> that provides the framework for the State's strategic and operational vision of the workforce system specifically as it relates to provision of quality employment and training opportunities for Older Workers. Each committee member has been asked to assure that "their network" of customers, providers, vendors, and advisors are made fully aware of the public comment process which will include three to four public meetings throughout the Commonwealth. Those comments will be reviewed and added as appropriate into the plan and responses to the comments will be published as well. The Commonwealth assures that the draft combined plan will be fully vetted by the public and each core required partner, including representatives of the area agencies on aging, State and MassHire Boards under WIOA, public and private nonprofit agencies and organizations providing employment services, including each grantee operating a SCSEP project within the State, except as provided under section 506(a)(3) of OAA and 20 CFR 641.320(b), social service organizations providing services to older individuals; grantees under Title III of OAA; affected communities, unemployed older individuals, community-based organizations serving older individuals, business and labor organization.

APPENDIX 1: PERFORMANCE GOALS FOR THE CORE PROGRAMS

Each state submitting a *Unified or Combined State Plan* is required to identify **expected levels of performance** for each of the primary indicators of performance for the first two years covered by the plan. The state is required to reach agreement with the Secretary of Labor, in conjunction with the Secretary of Education, on state-negotiated levels of performance for the indicators for each of the first two years of the plan.

Include the state's expected levels of performance relating to the performance accountability indicators based on primary indicators of performance described in section 116(b)(2)(A) of the Workforce Innovation and Opportunity Act (WIOA).

Performance Indicator	Title I – Adult Program Core Partner: MassHire Department of Career Services			
	Program Year: PY 2024		Program Year: PY 2025	
	Expected Level	Negotiated Level	Expected Level	Negotiated Level
Employment (Second Quarter after Exit)	79.0%		79.0%	
Employment (Fourth Quarter after Exit)	78.5%		78.5%	
Median Earnings (Second Quarter after Exit)	\$6,400.00		\$6,400.00	
Credential Attainment Rate	73.5%		73.5%	
Measurable Skill Gain	41.5%		41.5%	

Performance Indicator	Title I – Dislocated Worker Program Core Partner: MassHire Department of Career Services			
	Program Year: PY 2024		Program Year: PY 2025	
	Expected Level	Negotiated Level	Expected Level	Negotiated Level
Employment (Second Quarter after Exit)	83.0%		83.0%	
Employment (Fourth Quarter	83.0%		83.0%	

after Exit)				
Median Earnings (Second Quarter after Exit)	\$10,500.00		\$10,500.00	
Credential Attainment Rate	71.5%		71.5%	
Measurable Skill Gain	45.5%		45.5%	

Performance Indicator	Title I – Youth Program Core Partner: MassHire Department of Career Services			
	Program Year: PY 2024		Program Year: PY 2025	
	Expected Level	Negotiated Level	Expected Level	Negotiated Level
Employment* (Second Quarter after Exit)	75.0%		75.0%	
Employment* (Fourth Quarter after Exit)	72.0%		72.0%	
Median Earnings (Second Quarter after Exit)	\$3,700.00		\$3,700.00	
Credential Attainment Rate	65.0%		65.0%	
Measurable Skill Gain	45.0%		45.0%	

* For Title I Youth programs, employment, education, or training

Performance Indicator	Title II – Adult Education and Family Literacy Act Program Core Partner: Adult Community Learning Services			
	Program Year: PY 2024		Program Year: PY 2025	
	Expected Level	Negotiated Level	Expected Level	Negotiated Level
Employment (Second Quarter after Exit)	44%		44.5%	
Employment (Fourth Quarter after Exit)	46%		46.5%	

Median Earnings (Second Quarter after Exit)	\$7,500		\$7,800	
Credential Attainment Rate	29%		29%	
Measurable Skill Gain	47.5%		47,5%	

Performance Indicator	Wagner-Peyser Act Employment Service Program Core Partner: MassHire Department of Career Services			
	Program Year: PY 2024		Program Year: PY 2025	
	Expected Level	Negotiated Level	Expected Level	Negotiated Level
Employment (Second Quarter after Exit)	63.0%		63.0%	
Employment (Fourth Quarter after Exit)	65.0%		65.0%	
Median Earnings (Second Quarter after Exit)	\$8,100.00		\$8,100.00	
Credential Attainment Rate ²		Not Applicable		Not Applicable
Measurable Skill Gain ²		Not Applicable		Not Applicable

Performance Indicator	Vocational Rehabilitation Program Core Partner: Massachusetts Rehabilitation Commission			
	Program Year: PY 2024		Program Year: PY 2025	
	Expected Level	Negotiated Level	Expected Level	Negotiated Level
Employment (Second Quarter after Exit) ¹	53%		54%	
Employment (Fourth Quarter after Exit) ¹	50%		51%	

Median Earnings (Second Quarter after Exit) ¹	\$5,300.00		\$5,500.00	
Credential Attainment Rate ¹	27%		29%	
Measurable Skill Gain	45%		50%	

Performance Indicator	Vocational Rehabilitation Program Core Partner: Massachusetts Commission for the Blind			
	Program Year: PY 2024		Program Year: PY 2025	
	Expected Level	Negotiated Level	Expected Level	Negotiated Level
Employment (Second Quarter after Exit) ¹	53%		54%	
Employment (Fourth Quarter after Exit) ¹	55%		58%	
Median Earnings (Second Quarter after Exit) ¹	\$5,200.00		\$5,400.00	
Credential Attainment Rate ¹	25%		27%	
Measurable Skill Gain	45%		50%	

Performance Indicator	All WIOA Core Programs			
	Program Year: PY 2024		Program Year: PY 2025	
	Expected Level	Negotiated Level	Expected Level	Negotiated Level
Effectiveness in Serving Employers ³	84.5%		84.5%	

Additional State Indicators of Performance to Be Reported by Each Partner Agency ⁴
1. Number and percent of customers enrolled in training and exited who were employed in a training related job 2nd quarter after exit.
2. Number and percent of Veterans employed in the 2nd quarter after exit.
3. Number and percent of individuals with language barriers at registration employed in the 2nd quarter after exit.
4. Number and percent of individuals with a disability who were employed in the 2nd quarter after exit.
5. Number and percent of individuals receiving TANF and SNAP benefits who were employed in the 2nd quarter after exit.
6. Number of older workers (50+) who were employed in the 2nd quarter after exit.
7. Number of new businesses served.
8. Number and percent of businesses registered with MassHire Career Centers or served by Partner agencies that hired customers.

Establishment of Performance Goals:

Proposed (Expected) levels of performance must be submitted by each partner agency as part of the *State Plan*. Proposed expected levels will be negotiated with the relevant federal agencies (Department of Labor and Department of Education) to determine the approved performance goals for Program Year 2024 (July 1, 2024 – June 30, 2025) and Program Year 2025 (July 1, 2025 – June 30, 2026). Subsequent rounds of negotiations will occur for Program Year 2027 and Program Year 2028. Goals are updated in the *State Plan* as they are approved or modified.

Notes:

1. All Partners will be required to propose expected levels in PY 2024 and PY 2025.
2. The Credential Attainment Rate and Measurable Skills Gains indicators do not apply to the Wagner-Peyser Act Employment Service program.
3. The Effectiveness in Serving Employers indicator will be measured as a shared outcome across all six core programs to ensure a holistic approach to serving employers.

Attachments

A	<i>MassHire Charter</i>
B	<i>Universal Design Principles</i>
C	WIOA State Plan Metrics Definitions
D	<i>Statewide Partner Memorandum of Understanding (MOU)</i>
E	<i>Listing of MassHire Career Centers and Locations</i>
F	<i>2017 Census of Agriculture State Profile for Massachusetts</i>
G	<i>Integrated, technology-based jobseeker flow chart at for MassHire Career Centers (with Core Program partners)</i>
H	<i>Unemployment Insurance SQSP Package Documents</i> • <i>SQSP Transmittal Letter</i> • <i>Budget Worksheets/Forms</i> • <i>Corrective Action Plans (CAPs)</i> • <i>UI Program Integrity Action Plan (UI IAP)</i> • <i>Organizational Chart</i> • <i>SQSP Signature Page</i>

ATTACHMENT A: MASSHIRE CHARTER

VISION: MassHire envisions a better future for people and businesses of Massachusetts through meaningful work and sustainable growth.

MISSION: MassHire creates and sustains powerful connections between businesses and job seekers through a statewide network of employment professionals.

VALUES:

COLLABORATION: MassHire believes in the power of partnership and streamlined integration of services to achieve effective and timely results for those we serve.

RESPECT: MassHire is committed to understanding and valuing the diverse, unique requirements and professional goals of the businesses and people we serve.

RELIABILITY: MassHire creates trust and reliability by consistently delivering high quality professional services at each location and in every interaction.

INGENUITY: MassHire leverages flexibility, expertise, and knowledge to successfully meet our mission, regardless of new challenges and circumstances.

ESSENCE: “I feel like a valued, professional partner of MassHire.”

POSITIONING: MassHire is an essential catalyst for professional and economic growth across the Commonwealth.

PROMISE: MassHire promises to champion prosperity, connecting employers with talent and job seekers with tools, services, and connections to achieve meaningful and sustained employment.

PERSONALITY: “I am your trusted partner in achieving your personal and business goals. I embrace your needs as my mission and offer a welcoming, professional experience at every point in our journey together. I believe in you as I do in myself. Things change quickly... I GET IT. You can always depend on me to offer guidance, resources, and support. If you want a job, seek to fortify your business for the long-term, or need a quick response to a pressing need, I can help. “Let’s get to work!”

ATTACHMENT B: UNIVERSAL DESIGN PRINCIPLES

The examples for MassHire are provided by the Institute for Community Inclusion at UMASS Boston.

Principle One: Equitable Use

The design is useful and marketable to people with diverse abilities.

Guidelines:

- Provide the same means of use for all users: identical whenever possible; equivalent when not.
- Avoid segregating or stigmatizing any users.
- Provisions for privacy, security, and safety should be equally available to all users.
- Make the design appealing to all users.

Examples for a MassHire Career Center:

- During orientation, ask all customers if they need assistance completing registration rather than only individuals you think may have a disability.
- Make information on all services available to all customers and avoid assuming that certain customer groups or customers may or may not be interested in certain services.

Principle Two: Flexibility in Use

The design accommodates a wide range of individual preferences and abilities.

Guidelines:

- Provide choice in methods of use.
- Accommodate right- or left-handed access and use.
- Facilitate the user's accuracy and precision.
- Provide adaptability to the user's pace.

Examples for a MassHire Career Center:

- Provide options for a career interest inventory that can be completed on-line, on paper, or through answering questions through an interview.
- Provide a range of options for inputting information in a computer including a keyboard, trackball or a mouse.
- Provide information through both on-line self-directed methods, as well as in group workshop settings.

Principle Three: Simple and Intuitive

Use of the design is easy to understand, regardless of the user's experience, knowledge, language skills, or current concentration level. Eliminate unnecessary complexity.

Guidelines:

- Eliminate unnecessary complexity.
- Be consistent with user expectations and intuition.
- Accommodate a range of literacy and language skills.
- Arrange information consistent with its importance.
- Provide effective prompting and feedback during and after task completion.

Examples for a MassHire Career Center:

- In an interviewing workshop, when talking about potential interview questions, role-play answers to questions, then promptly give suggestions about how interviewees might improve their answers.
- Provide information in multiple languages.
- Use touch screens with graphics for inputting information in a kiosk or computer.

Principle Four: Perceptible Information

The design communicates necessary information effectively to the user, regardless of ambient conditions or the user's sensory abilities.

Guidelines:

- Use different modes (pictorial, verbal, tactile) for redundant presentation of essential information.
- Provide adequate contrast between essential information and its surroundings.
- Maximize "legibility" of essential information.
- Differentiate elements in ways that can be described (i.e., make it easy to give instructions or directions).
- Provide compatibility with a variety of techniques or devices used by people with sensory limitations.

Examples for a MassHire Career Center:

- During trainings and workshops, present information verbally and in writing, and incorporate graphics to illustrate information, so individuals can receive information in the manner that best suits them.
- In the resource room, for all signage, use graphics and pictures combined with text. Use color to correspond to different types of information (e.g., job listings printed on different color paper from workshop notices; job listings for different job categories contained in different color binders).

Principle Five: Tolerance for Error

The design minimizes hazards and the adverse consequences of accidental or unintended actions.

Guidelines:

- Arrange elements to minimize hazards and errors: the most used elements are most accessible; hazardous elements are eliminated, isolated, or shielded.
- Provide warnings of hazards and errors.
- Provide fail-safe features.
- Discourage unconscious action in tasks that require vigilance.

Examples for a MassHire Career Center:

- In the resource room or library, configure most computers so that customers cannot inadvertently change settings, while having a couple of computers with a more flexible configuration so that users can more easily access the built-in accommodation features, and change these as necessary for their specific needs.
- Have computer procedures set up that ensure automatic back-up of job seeker resume, cover letters, job listing research, etc., avoiding accidental deletion.

Principle Six: Low Physical Effort

The design can be used efficiently and comfortably, and with a minimum of fatigue.

Guidelines:

- Allow user to maintain a neutral body position.
- Use reasonable operating forces.
- Minimize repetitive actions.
- Minimize sustained physical effort.

Examples for a MassHire Career Center:

- Provide adjustable chairs, desks, and tables for workstations and classrooms.
- Avoid storing paper resource materials in file drawers that can be heavy and difficult to open. Use notebooks or other alternatives instead which are more accessible.
- Set up Macros on computer keyboards for standard cover letter and resume text.

Principle Seven: Size and Space for Approach and Use

Appropriate size and space is provided for approach, reach, manipulation, and use regardless of user's body size, posture, or mobility.

Guidelines:

- Provide a clear line of sight to important elements for any seated or standing user.
- Make the reach to all components comfortable for any seated or standing user.
- Accommodate variations in hand and grip size.
- Provide adequate space for the use of assistive devices or personal assistance.

Examples for a MassHire Career Center:

- Plan group meetings and workshops in a room large enough for a sign language interpreter and so that individuals who use wheelchairs have ample space to turn around.
- Design the front desk area so there are sections where the counter height is appropriate for customers who are standing, as well as a section that is lower so individuals in wheelchairs can interact with staff on a face-to-face level, and easily reach documents and materials.

ATTACHMENT C: WIOA STATE PLAN METRICS DEFINITIONS

	Definition
Shared Customer	A customer that received services from MassHire and one or more partner agencies.
Customer Diversity	Demographics of customers (e.g., race/ethnicity, age, gender, and disability).
Entered Employment*	A customer who is in unsubsidized employment.
Median Earnings*	The wage paid to hired customers that falls in the middle of the earnings distribution; half earned less - half earned more.
Employment Retention*	A customer who remains employed during consecutive quarters.
Credential Attainment*	A recognized postsecondary credential or a secondary school diploma, or its recognized equivalent including valid industry-based credentials.
Educational Advancement*	Progression in the enrollment and/or completion of postsecondary education, and occupational skills trainings.
Career/wage “pathway”	Progression in a shared customer’s educational advancement, credential attainment, employment, and wages over time.
Apprenticeship	A work-based training program that has been registered with the Massachusetts Division of Apprenticeship Standards.
Work Based Learning	An educational strategy that aligns classroom and workplace learning with academic, technical and employability skills in a work setting. (Examples include internships, apprenticeships, on-the-job training, incumbent worker training, etc.)
Businesses Served*	A business customer that has received a service from MassHire or a partner organization.
Repeat Businesses*	A business customer that has received a service from MassHire or a partner organization in multiple time periods.
Referred applicants hired	A jobseeker customer referred to a job posting of a business customer who was subsequently hired by that business.
Business Customer Satisfaction	A measure of how a business customer feels the workforce system met their business need(s).
Time to employment	The amount of time between an unemployed customer’s first service with the workforce system and their hire date.
Job Posting	An employment opportunity published and distributed by workforce system partners.

*Denotes a performance metric that is also reported to the federal government by MassHire and partner agencies.

ATTACHMENT D: Statewide Partner Memorandum of Understanding (MOU)

Note: State Partner MOU is a work in progress and signatures will be obtained prior to the final submission in March 2024.

I. Introduction to State WIOA MOU

The Workforce Innovation and Opportunity Act (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. The State WIOA MOU articulates agreement among all state-level workforce system partners to fulfill the WIOA mission and strategies outlined in the 2024 Massachusetts' WIOA Combined State Plan.

A. WIOA Principles

WIOA strengthens the United States public workforce development system through innovation, alignment, and improvement of employment, training, and education programs, and promotes economic growth. WIOA stresses three principles for the workforce system:

- Program Alignment

a.	Unified strategic planning
across a wide range of partners and programs (defined in MOU)	Sections III A and B of this
b.	Enhanced role for State and
Local Area Workforce Boards in developing and	implementing a WIOA State
Plan	

- Effective Service Delivery

- o Engagement of businesses and alignment of education and training activities through career pathways
- o Partnerships and investments in the MassHire Career Center delivery system

- Increased Accountability

- o Common, federally designed WIOA measures across WIOA titles I, II, III, IV as identified by the federal government
- o State-designed performance measures to evaluate the effectiveness of education and workforce programs
- o Accountability and transparency through reporting and evaluations

B. MOU Partner Consensus

All Massachusetts residents will benefit from a world-class, modern, integrated system of education, workforce, and business services that supports *career pathways* for individuals and leads to a more informed, educated, diverse, and skilled workforce that meets the Commonwealth’s businesses’ demands and sustains a diverse labor force and thriving economy.

MOU partners will work to:

- a. **Design career pathways** aligned with business demand across federal, state, and community-based partners
- b. **Improve employability skills and transitions to postsecondary education and training** for individuals with barriers to employment including under- educated, limited English proficiency adults, individuals with disabilities, youth, and young adults
- c. **Assist low-income individuals and families to achieve economic self- sufficiency** through labor-market driven credentialing and employment, and leveraging supports and services provided by the broader partner network (MOU signatories)
- d. **Meet the needs of both job seekers and businesses** who engage in the public workforce system
 - i.

technical assistance team to support problem quality improvement and oversight to Local Area all regions (Local Area MOU teams) are operating effectively.

Build an integrated, statewide resolution and continuous MOU teams to ensure that collaboratively and

II. Purpose of Memorandum of Understanding (MOU)

The Purpose of the MOU is to:

- o **Articulate a coordinated vision for organizing the Massachusetts public workforce system** to produce the best possible outcomes for shared customers, including youth, job seekers, and businesses.
- o **Establish agreement at the state level to design partnerships and coordinate service delivery systems through the MOU partners** (both Core Partners and Additional Partners identified in Sections III A and B of this MOU) to ensure that Massachusetts businesses and job seekers, including those individuals with disabilities, low-income status, education or language barriers, Veterans and other individuals “shared” by the MOU partners achieve/demonstrate measurable and better access and outcomes in the areas of education, training, job placement, wages, and economic mobility.
- o **Affirm the definition and set of shared infrastructure costs as provided in MOU Sections VII**, to support partnerships and service delivery between the WIOA Core Partners (identified in Section III A of this MOU), specialized centers such as Massachusetts Rehabilitation Commission (MRC) Area Offices, and/or affiliated centers, and the Local Area MassHire Workforce Boards and MassHire Career Centers in Local Areas as authorized by WIOA.

- **Guide the continued development of Local Area partnerships and Local Area MOU agreements** (as required by WIOA Section 121(b)/WIOA Regulations 20 CFR Part 678.500) on how services can be connected, integrated, or enhanced by sharing staffing, resources, or jointly designed services in ways that improve outcomes for shared customers – youth, job seekers and businesses.
 - a. This MOU confirms the framework for Local Area MOUs as outlined in the MA WIOA Joint Partner Guidance 100 DCS 03.2012: **Workforce Innovation and Opportunity Act (WIOA) Local Memorandum of Understanding (MOU) Guidance**. This policy will be updated during Commonwealth Fiscal Year 2024.
 - b. If Local Area WIOA Core Partners cannot execute an MOU that meets the statewide expectations outlined in the Joint WIOA Local Area MOU policy (referenced above), the state WIOA Core Partners will finalize the agreement for the Local Area through an approved dispute resolution process as provided for by the MassHire State Workforce Board and the Governor. Departments administering WIOA funding and departments administering programs that are WIOA Core Partners (listed in Section III A of this State WIOA MOU) shall have input into the development of the dispute resolution process.
- III. **Massachusetts Workforce Partners (WIOA Core Partners and Additional Partners)**
- A. Consistent with WIOA, Section 121(b), and WIOA Regulations, 20 CFR 678.400, the following programs are identified as Core Partners:
 - **The Adult Program (Title I of WIOA)**, as part of the MassHire Department of Career Services (MDCS), Executive Office of Labor and Workforce Development (EOLWD), programs authorized under Title I, including Job Corps, YouthBuild, Native American programs, and Migrant Seasonal Farmworkers programs;
 - **The Dislocated Worker Program (Title I)**, as part of MDCS, EOLWD;
 - **The Youth Program (Title I)**, as part of MDCS, EOLWD;
 - **The Adult Education and Family Literacy Act Program (Title II)**, as part of Adult and Community Learning Services (ACLS), Department of Elementary and Secondary Education (DESE), Executive Office of Education (EOE);
 - **The Wagner-Peyser Act Program** (Wagner-Peyser Act, as amended by Title III), as part of MDCS, EOLWD;
 - **The Vocational Rehabilitation Program** (Title I of the Rehabilitation Act of 1973, as amended by Title IV), as part of the Massachusetts Rehabilitation Commission (MRC) and Massachusetts Commission for the Blind (MCB), Executive Office of Health and Human Services (EOHHS);
 - **Federal-state unemployment compensation program**, as part of the Department of Unemployment Assistance (DUA), EOLWD;

- **Trade Adjustment Assistance for Workers Programs** (Activities authorized under chapter 2 of Title II of the Trade Act of 1974 (19 U.S.C. 2271 et seq.)), as part of MDCS, EOLWD;
- **Jobs for Veterans State Grants Program** (Programs authorized under 38, U.S.C. 4100 et. seq.) as part of MDCS, EOLWD;
- **Temporary Assistance for Needy Families Program** (42 U.S.C. 601 et seq.) as part of Department of Transitional Assistance (DTA), EOHHS;
- **Employment and Training Programs under the Supplemental Nutrition Assistance Program**, (Programs authorized under section 6(d)(4) of the Food and Nutrition Act of 2008 (7 U.S.C.2015(d)(4)), as part of DTA, EOHHS; and
- **Senior Community Service Employment Program** (Programs authorized under Title V of the Older Americans Act of 1965 (42 U.S.C. 3056 et seq.))

B. **receiving WIOA funding)** included in the state team and **Additional Partners (not suggested for Local Area Area MOUs.**

1. Executive Office of Economic Development
 - o Massachusetts Office of Business Development
2. Executive Office of Housing and Livable Communities
3. Executive Office of Education
 - o Carl D. Perkins Career and Technical Educational Act of 2018, Chapter 70, Chapter 74 funded programs
 - o Department of Higher Education
4. Massachusetts Executive Office of Veterans Services
5. Division of Apprentice Standards
6. Department of Transportation
7. Department of Correction
8. Commonwealth Corporation
9. Community Based Organizations
10. Operational ABLE
11. Senior Services America, Inc.
12. Business associations
13. Philanthropy

C. Role of MOU Partners and the State MOU

The State WIOA MOU (this document) was initially established as part of the Massachusetts 2016 WIOA Combined State Plan with input from MOU Core and Additional Partners, stakeholders, and the public. The role of the State WIOA MOU is to improve outcomes for job seekers and business customers by organizing resources, services, and structures through a “customer-centric” lens rather than the bureaucratic administration of federal or state resources. This State WIOA MOU is designed to outline areas of agreement that help the Commonwealth implement WIOA including:

- a. Focus on Business-Driven Services
- b. Priority of Service for Individuals with Barriers to Employment
- c. Streamlining Workforce Structures (Workforce Boards, Service Delivery, etc.)
- d. Partnerships Across WIOA Programs
- e. Regional Planning
- f. Performance Metrics Across All Partners (including new state-driven metrics)

In addition, the State WIOA MOU is intended to further Massachusetts-driven strategic initiatives to enhance the workforce system including:

- Integrating the MassHire Vision, Mission, and Values
- Pursuing the goals and strategies articulated in the 2024 WIOA Combined State Plan
- Expanding capacity of the workforce system to accelerate employment, especially for those with challenges to employment
- Improving career mobility and employment outcomes for youth
- Supporting business growth and sustainability, elevating workforce services and developing diverse talent pipelines for businesses
- Ensuring Massachusetts has a world-class service delivery system by integrating use of modern tools and techniques
- Developing statewide data sharing initiatives to facilitate program and partner integration.

The MassHire Workforce Boards and MassHire Career Centers will continue to convene the various WIOA Core and Additional Partners to leverage relationships with the business community and enhance a coordinated approach to outreach and service delivery. Most importantly, connecting outreach activities to employment outcomes of job seekers across the partners is a significant task for a truly “integrated” system.

In addition, the Core Partners will implement “priority of service” requirements to ensure that individuals with barriers (including individuals who are low-income, have limited education or technical skills, limited English proficiency, Veterans, ex-offenders, recipients of public assistance or face other barriers to employment such as disabilities, homelessness, etc.) are able to access critical employment and training services through the MassHire Career Center system and WIOA Core Partner programs.

In order to shift MassHire Career Center practices to develop priority of service requirements, all MOU Core and Additional Partners (listed in Sections III A and B of this MOU) shall work together with MassHire Career Centers to:

- i. *Refine the local definition of Shared Customers between MOU Core and Additional Partners* in the Local Area MOU to foster a clear understanding of how multiple providers, services, and resources should support an individual person or business;

- ii. *Implement the Local Area's MassHire Career Center Customer Flow and service practices across WIOA Core and Additional Partner agencies, including embedding universal design principles to ensure the accessibility and availability of services to Shared Customers;*
- iii. *Utilize robust technology tools to scale-up practices and provide more significant supports for individuals with barriers to employment, including basic skill assessment, remediation, and career development tools; and*
- iv. *Track and evaluate the outcomes for individuals who face barriers to employment.*

IV. MOU Agreements for State Partners

- All the State WIOA MOU Core and Additional Partners agree to the following activities at the state level:
 - 1. **Participate in the process to develop a WIOA Combined State Plan** and subsequent updates to the Plan, including reviewing, commenting, and approving the appropriate operational planning elements of the Combined State Plan that impact programs and funding that serve shared customers;
 - 2. Commit to developing a shared understanding of partner programs and **policies** and to identify and remove barriers for participation (state and local level) within and across the

MassHire system. Define and share information on:

- A. Populations served by partner systems
- B. Eligibility criteria of partner systems
- C. Resources available to businesses.
- D.

3. representing each of the Core and Additional WIOA Partners III, IV, TANF/SNAP, and other partners), as appropriate, to Workforce Boards

Identify individuals best (defined as including Title I, II, serve on Local Area MassHire

A. The Local Area Chief Elected Official (CEO) designated by the Governor consults with the Adult Basic Education (ABE) state director to ensure that ABE is properly represented on the Local Area MassHire Board. If there are multiple ABE programs in a region, the CEO, in collaboration with the ABE state director, develops a process for ABE program directors to nominate a representative to serve on the local Board with input from the state ABE Director.

4. **represent the MOU Core and Additional Partners to certification process of Local Area MassHire Workforce Boards properly consider and serve the needs of the WIOA**

Identify individuals that best participate in the state's Boards to ensure MassHire Core Partner program.

5. **represent their WIOA Core Partner(s)** (listed in Section III WIOA Lead Operator competitive selection process Board to ensure the Local Area’s MassHire Career Center(s) Core Partner program.

Identify individuals that best A) to serve on the Local Area managed by the MassHire serves the needs of the WIOA

6. **of statewide policies and programs across Core and** service pathways for youth to develop employability and expand Work Based Learning and career pathways for youth States Departments of Labor, Education, and Health and that Career Pathways are:

Commit to the development
Additional Partners that build career navigation skills, and and young people. The United Human Services have agreed

A series of connected education and training strategies and support services that enable individuals to secure industry relevant certification and obtain employment within an occupational area and to advance to higher levels of future education and employment in that area.

7. **initiatives and strategies** that are coordinated across the system MassHire BizWorks and the Massachusetts Workforce Skills partnerships, the Workforce Training Fund, the Workforce and others).

Participate in business (including the work of Cabinet, MRC employer Competitiveness Trust Fund,

8. **an online, common intake and referral portal** to work MOU partners (as appropriate) to facilitate referrals, career planning, and data reporting for “shared” customers. continue to have representatives on a committee that works to requirements, including appropriate security protocols, for an

Continue to define and build across the data systems of registration, assessment, The MOU Partners will design the business online tool.

a) MOU partners will develop policies regarding referrals among agencies for prioritizing enrollments (e.g., when there is a waitlist).

9. **training for front-line staff** who are delivering services for Critical training areas include:

Design state and regional each WIOA program partner.

1. Program eligibility criteria for services and referral processes for the WIOA Core Program (Section III A and B)
2. Business services offered by each MOU partner
3. Labor market information on high-demand industry and careers produced by the MassHire Department of Career Services, Department of Unemployment Assistance, or the Department of Economic Research

4. Best practices for serving WIOA priority populations (WIOA priority populations includes individuals that are: low income, low skilled, persons with Limited English Proficiency, people with disabilities, older workers, returning citizens, racial/ethnic minorities, Veterans, unemployment claimants, etc.)
 5. Evidence-based models for integrated education and training, career pathways, wrap-around/college and career readiness support services
- **Continue to implement a uniform methodology for calculating infrastructure costs and shared resources within Local Area MOUs**, including in-kind staff contributions such as MRC vocational rehabilitation counseling staff time or Adult Basic Education out-stationing staff. Each partner will negotiate with the local area on the type of activity and the type of support provided.
 - See Sections VII C-F for detail on calculations for state and local area cost-sharing mechanisms.
 - All MOU Core and Additional Partners agree to revise the MA WIOA Joint Partner Guidance 100 DCS 03.2012: **Workforce Innovation and Opportunity Act (WIOA) Local Memorandum of Understanding (MOU) Guidance** that includes directions for Local Areas on Core and Additional Partners required on the Local Area MOU planning teams, as well as the required Local Area MOU content that demonstrates Local Area Core and Additional Partner commitment and activity toward building an integrated workforce system. MOU Planning Teams are led by the Local Area MassHire Workforce Board and CEO and is comprised of individuals who are empowered to represent the MOU Core and Additional Partner agency or organization for the purpose of developing and executing the Local Area MOU, modeled on the State WIOA MOU.
 - State WIOA MOU Core and Additional Partners agree to support the WIOA Local Area MOU Planning Teams to ensure Local Areas are demonstrating reasonable progress toward meeting the required Local Area MOU provisions as required in the **WIOA Joint Core Partner Local MOU Policy Guidance**. MOU support includes reviewing and providing written feedback on Local Area MOUs submitted by Local Area, providing training and technical assistance to local areas through a Joint Partner MOU Support Team, facilitating peer-to-peer learning by sharing successes and best practices from Local Areas, and regular review and feedback of the Local Area MOU. State Core and Additional Partners agree to facilitate connections with existing Local Area planning teams (e.g., regional planning, etc.) to ensure strategic alignment with other planning and activities taking place in the region.
 - In accordance with the **Workforce Innovation and Opportunity Act (WIOA) Local Memorandum of Understanding (MOU) Guidance**, Local Area MOUs outline steps to address the following items:
 - a. A strategy and process to share information on the labor market.
 - b. The development of career pathway maps and/or service flowcharts for youth 16-24 across WIOA Youth programs, MassHire Career Centers, adult education (Title II)/DESE, TANF/DTA, MRC/MCB, YouthWorks, and other key partners in the

Local Area to collaboratively leverage resources for the purpose of expanding access to credentials and work-based learning for target populations, including:

- i. Unemployed individuals (including those served by the Reemployment Services Eligibility Assessment (RESEA))
- ii. Low-skilled, limited-education individuals
- iii. People with disabilities
- iv. Individuals with Limited English Proficiency
- v. Individuals and families receiving public assistance
- vi. Homeless / unstable housing
- vii. Veterans
- viii. Youth
- ix. Businesses

V. Timeline and Amendments for State MOU

A.

Duration

- 1. The effective date is July 1, 2024.
- 2. The State Partner MOU will be reviewed and updated as necessary during the required two-year modification of the WIOA Combined State Plan.

B. Amendments

- 1. A Partner on the MOU can request an amendment to the MOU, or the MassHire Performance Committee can make a recommendation to MassHire State Workforce Board and/or Governor for amendments or renewals.
- 2. The MassHire State Workforce Board's MassHire Performance Committee shall review the State MOU annually to ensure appropriate funding, delivery of services, and achievement of outcomes.

VI. Governance of Shared System

A.

Accountability

- 1. The Governor bears ultimate accountability for governance of federal programs authorized under WIOA.
- 2. The MassHire State Workforce Board (State Board) will provide guidance and direction to the workforce system through the WIOA State Plan.
 - a. The MassHire Performance Committee will ensure fidelity to the Plan and oversight of cross-system integration and operation.
 - b. All WIOA Core Partners and Additional Partners on the MOU will execute the MOU through agency directors and/or designated staff in the WIOA Joint Partner Policy group (or similar body), work groups, and MassHire State Workforce Board meetings.

B. Data and Outcome Reporting Across Partners

- WIOA Core Program Partners will work together to develop separate, agency-specific data matching agreements and MOUs between partners to measure the outcomes of customers utilizing workforce system and core partner services, and evaluation studies on the impact of education, workforce, and health and human service investments.
 - Under the large umbrella of the workforce system, and as permitted by state and federal law, the MassHire State Workforce Board and the Department of Unemployment Assistance will work with other critical, non-WIOA partners to develop separate, agency-specific data matching agreements relevant to understanding education, workforce, and economic development outcomes. The data matching agreements will meet the data requirements of state designed WIOA measures developed by the partners included in the State Plan.

VII. Local Area Memorandum of Understanding (MOU)

WIOA Section 121(c) and 20 CFR Parts 678.500-510 require that a Memorandum of Understanding be executed between a Local Area MassHire Workforce Board and Local Area WIOA Core Partners in the MassHire Career Center (listed in Section III A of this MOU).

The WIOA Core Partners agree that staff or programs operating in a region will be identified to participate in the development of the Local Memorandum of Understanding (Local Area MOU). The Local Area MassHire Workforce Board will act as the convener of Local Area MOU negotiations and together with partners will shape how local MassHire Career Center services are delivered.

A. Process

The Local Area MassHire Workforce Board will convene representatives of WIOA Core and Additional Partners in the Local Area and other stakeholders to develop shared service strategies for job seekers and businesses and identify related shared customer flow.

Local Area strategies will include but not be limited to operational and service workflows, related referral processes, coordinated staff development and training, marketing and community integration, co-locations of staff (physical or virtual), and the nature and provision of related infrastructure and shared costs.

These strategies will be designed by the Local Area WIOA planning team to meet the service, resource, and technology needs of the center and take into consideration the individual characteristics, service needs, and resources of each of the WIOA Core Partners.

Strategies should be both data-and demand-driven to further support the development of local service strategies and the needs of businesses and job seekers.

The Local Area MOU will include agreements on the specific infrastructure and shared program costs including the method by which revenue and costs will be supported by each partner.

Cost calculations will take into consideration the proportionate share of use of MassHire Career Center consistent with budgets, mandates, and program limitations and must be spent solely for purposes allowable according to the partner authorizing statutes and other applicable legal requirements, including Federal cost principles.

MA WIOA Joint Partner Guidance 100 DCS 03.2021: **Workforce Innovation and Opportunity Act (WIOA) Local Memorandum of Understanding (MOU) Guidance**

details the requirements that must be included in each of the Local Area MOUs (1 for each of the 16 WIOA regions), including:

- A description of the process to develop a Local Area MOU;
- A description of the priority populations referenced in Section IV. D and additional populations identified by the Local Area MOU Partners;
- A description of the continuum of services available for each priority population;
- A description of the continuum of services available for businesses;
- A description of agreements and efforts to integrate principles of diversity, equity and inclusion in the local partnership and service delivery.
- Access to technology and materials that are available through the MassHire Career Center service delivery system;
- Coordinated staff development and training;
- Assurances of participation of WIOA Core Partners (at a minimum, partners described in Section III A of the MOU);
- A plan to fund joint costs:
 - Funding of infrastructure costs
 - Funding of shared services and operating costs of service delivery system
- Duration of the Local Area MOU;
- Assurances covering Local Area MOU review, revisions, and other provisions agreed to by local areas including convening locally as an MOU Team at least quarterly and agree to the roles and responsibilities each Partner will have in the development of a diverse, equitable, and inclusive integrated service delivery strategy that meets the needs of customers and businesses.

The Local Area MOU may include other provisions agreed to by all parties that are consistent with all partner programs, services and activities authorizing statutes, and regulations.

The Local Area MOU must include all requirements as set-forth in the most up to date WIOA Local Area MOU policy guidance. In addition, the local MOU will reflect an agreement of the Local Area MOU Core and Additional Partners to jointly review the WIOA-mandated performance metrics for the region or metrics negotiated as part of any shared and infrastructure contract costs between a Local Area (MassHire Board) and the mandated MassHire Career Center, including incentives and penalties.

Although the Local Area MassHire Workforce Board (with agreement of the Chief Elected Official and WIOA Core Partner) may enter into a separate agreement with each WIOA Core Partner or group of WIOA Core Partners under the purview of WIOA, the State WIOA Core Partners require that a single “umbrella” Local Area WIOA MOU be executed to address the issues relating to the MassHire Career Center service delivery across all WIOA Core Partners unless sufficient evidence can be provided as to why a Local Area cannot develop an umbrella MOU.

The Local Area MOU is fully executed when it contains the signatures of the MassHire Board, WIOA Core Partners (Section III A of this MOU), and the Chief Elected Official (CEO), and states the time period that the MOU is in effect.

B. Interim Plan or Local Area MOU impasse

If necessary, an interim infrastructure funding agreement may be put in place initially. The funding agreement must be finalized, within 6 months of the signing of the MOU. If it is not finalized within that timeframe, the Local Area MassHire Board must notify the Governor as described in WIOA Section 121 (h) and 20 CFR Part 678.725, and the state infrastructure mechanism will trigger.

The Local Area MassHire Workforce Board must report to the State Board, Governor, and the appropriate WIOA Core Partner state agencies if MOU negotiations with WIOA Core Partner agencies have reached an impasse. The Local Area MassHire Workforce Board and MOU Core Partners must document the negotiation and efforts that have taken place in the MOU negotiations.

Impasses related to infrastructure costs must be resolved using the State Infrastructure cost funding mechanism (Section VII, D).

C. Infrastructure and Shared Cost Funding

WIOA sections 121(h) and 121(i), and 20 CFR 678, Subpart E 20 CFR 700 -760, require that MassHire Career Centers Core Partners contribute jointly to fund infrastructure costs, as well as use a portion of the funds available to support their programs, activities and services operated through a Local Area MassHire Career Center consistent with the proportional burden, program mandates and limitations, and the state infrastructure-cost default funding caps, should Local Area consensus not be reached.

These support costs are defined as shared and infrastructure costs. The proportion of the shared and infrastructure costs paid by each WIOA Core Partner must comply with federal cost principles, which require that all costs must be allowable, reasonable, necessary, and allocable to the program, and must be in accordance with all other applicable legal requirements.

Funding contributed by Core WIOA Partners is intended to:

- Maintain the MassHire Career Center delivery system to meet the needs of the Local Area;
- Reduce duplication by improving program effectiveness through the sharing of services, resources, and technologies among Partners;
- Reduce overhead by streamlining and sharing financial, procurement, and facilities costs;
- Encourage efficient use of information technology;
- Ensure that costs are appropriately shared by MassHire Career Center Core Partners by basing contributions on proportionate share of use, and requiring that all funds are spent solely for allowable purposes; and
- Ensure that services provided by the MassHire Career Center are allowable under the Partner's program.
- Ensure equitable access to programs and services for populations with barriers to completing education and obtaining employment.

D. Infrastructure Funding Agreement (IFA)

The signatories to this State WIOA MOU agree that all WIOA Core Partners have a joint funding responsibility to support and maintain an effective Local Area integrated service delivery system. In addition, all Parties recognize that infrastructure costs are applicable to the WIOA Core Partners. As such, a MassHire Career Center Infrastructure Funding Agreement (IFA) shall be developed and updated annually to determine the appropriate annual WIOA Core Partner infrastructure contributions. The Infrastructure Funding Agreement is updated annually, and published as a Joint Partner Policy Issuance on the WIOA State Partner Infrastructure Contributions.

All signatories further acknowledge that the Local Area MOU serves the purpose of the infrastructure funding agreement (IFA) as required by WIOA. The IFA will be revisited annually and periodically reconciled against actual costs incurred and will be adjusted accordingly to ensure that it reflects a cost allocation methodology that demonstrates how infrastructure costs are charged in proportion to relative benefits received.

Infrastructure funding contributions are based upon a methodology where infrastructure costs are charged to each partner in proportion to relative benefits required contributions determined by the Governor if consensus is not reached between the Local Area board,

chief elected officials and WIOA Core Partners. In addition, the IFA includes timelines regarding notification to the Governor if Local Area agreement is not reached that will trigger a State-Infrastructure Funding Mechanism.

As appropriate, State Partners will enter into Inter-Agency Service Agreements (ISAs) or Contracts with MDCS, as the designated State Workforce Agency (SWA), to issue the Local Area allocations. MassHire Boards will ensure all allocations are incorporated into the Local Area integrated budget during the annual planning process. MDCS will monitor the spending of all shared and infrastructure costs and Local Area MOU partners will meet regularly to discuss integrated service delivery strategies and the shared and infrastructure funds needed to actualize services. On an annual basis, Local Area MOU Partners will provide suggestions and recommendations to state level partners for adjustments to shared and infrastructure funding.

- **Shared Costs Funding Mechanism**

WIOA Core Partners developed agency-specific guidelines to be utilized during Local Area MOU negotiations to assist in determining each WIOA Core Partner's proportionate share of shared costs (as defined in VII, F). These guidelines are consistent with the WIOA Core Partner's mandates, budgets, and program limitations and take into consideration the default caps on required contributions delineated in WIOA section 121 (h) and 20 CFR Part 678.735. Once contributions are identified by Local Area partners via successful Local Area MOU negotiations or at the state level if Local Area consensus fails, the method of transferring negotiated partner funds to the MassHire Career Center system may be via direct contract from the WIOA Core Partner agency to the Local Area or to the area via funds transferred from the WIOA Core Partner agency to EOLWD to distribute to the Local Area, as appropriate.

E. **Definition of Share Costs and Infrastructure Costs**

- **Shared Costs**

Shared costs are costs jointly identified by the MassHire Workforce Board, MassHire Career Centers, and each WIOA Core Partner to provide services to shared customers across program staff and facilities. MassHire Career Centers (co-enrolled participants) and WIOA Core Partners on the Local Area MOU will develop the appropriate activities and services for the shared customer pools. Activities and services include, but not limited to, the following:

- a. Intake
- b. Needs assessment
- c. Basic skills assessments
- d. Identification of appropriate services to meet needs
- e. Referrals to other MassHire Career Center partners
- f. Business services

- g. Support for programs to invest in or create access to assistive technologies

Pursuant to WIOA Section 121 (i) and 20 CFR 678.760, shared costs must be determined as part of the Local Area MOU and may include cash and non-cash resources.

- **Infrastructure Costs**

MassHire Career Center infrastructure costs are defined as non-personnel costs necessary for the general operation of the MassHire Career Center, including:

1. Facility and rental costs
2. Utilities and maintenance
3. Equipment (including assessment-related and assistive technologies for individuals with disabilities)
4. Technology to facilitate access to the MassHire Career Center (including planning and outreach)
5. Common MassHire Career Center delivery system identifier costs (signage and other identifier-related items)

Infrastructure costs are funded through a State MassHire Career Center Infrastructure Funding Agreement set by the Governor, after consultation with the CEOs, MassHire Workforce Boards, and the MassHire State Board, that determines the WIOA Core Partner contributions in accordance with section VII D.

VII. Signatories

By signing this agreement, all parties agree that the provisions contained herein are subject to all applicable Federal, State, and local laws, regulations, or guidelines. By signatures affixed below, the parties specify their agreement:

Secretary Lauren Jones
*Executive Office of Labor and Workforce
Development*

Secretary Patrick Tutwiler
Executive Office of Education

Secretary Kate Walsh
*Executive Office of Health and Human
Services*

Secretary Yvonne Hao
*Executive Office of Housing and Economic
Development*

Secretary Jon Santiago
Executive Office of Veterans Services

Secretary Ed Augustus
*Executive Office of Housing and Livable
Communities*

Katie Dishnica
Department of Unemployment Assistance

Commissioner Jeff McCue
Department of Transitional Assistance

Commissioner Toni Wolf
Massachusetts Rehabilitation Commission

Commissioner John Oliveira
Massachusetts Commission for the Blind

Secretary Elizabeth Chen
Executive Office of Elder Affairs

Commissioner Jeffrey Riley
*Department of Elementary and Secondary
Education*

Molly Jacobson, President & CEO
Commonwealth Corporation

Commissioner Noe Ortega
Department of Higher Education

Undersecretary Josh Cutler
Division of Apprenticeship Standards

Commissioner Carol Mici
Department of Corrections

Acting Director Diane Hurley
MassHire Department of Career Services

Marian Walsh, President and CEO
Operation ABLE

Christine Garland, VP of Workforce
Development
Senior Service America, Inc.

VIII. Definitions

1. **Administrative Entity:** Entity(ies) designated by the CEO to coordinate and administer WIOA activities and services within a local area on the local board's behalf and in accordance with all applicable federal, state, and local laws, regulations, rules, policies, plans, and the terms of this *MOU*.
2. **Chief Elected Official:** Identified in WIOA Section 3 Definitions (9) as the chief elected officer of a unit of general local government in a local area or the individual(s) designated under a local agreement pursuant to WIOA Section 107(c)(1)(B).
3. **Career Services:** The services which shall be available, at a minimum, to individuals who are adults or dislocated workers through the career center delivery system in each local area. The career services that must be provided as part of the career center delivery system are listed in WIOA Section 134(c)(2).
4. **Combined Plan:** Per WIOA Section 103, a state may develop and submit a combined plan for the core programs and 1 or more of the programs and activities defined in Section 103 (a) (2).
5. **Common Measures:** Primary indicators of performance," for its six core programs
6. **Core Partner:** An entity that carries out one or more of the programs or activities identified under WIOA Section 121 (b)(1) and is required under that Section to participate in the career center delivery system and to make the career services under its program or activity available through the career center system
7. **Cost Allocation:** Per 66 Fed. Reg. 29639, cost allocation is the measurement of actual costs in relation to the benefit received to determine each partner's fair share of career center operating costs.
8. **Fair Share:** The portion of career center operating costs allocated to each partner in proportion to the benefits the Partner receives from participation in the career center system.
9. **Fiscal Agent:** An entity appointed by a local area's CEO in accordance with WIOA Section 107 (d)(12)(B)(i)(II) and (III)) to be responsible for the administration and disbursement of WIOA and other funds allocated for workforce development activities in the local area. WIA Section 107(d)(12)(B)(i)(II) provides that designation of a fiscal agent does not relieve the CEO from his/her liability for any misuse of grant funds.
10. **Governor's Massachusetts Workforce Development Board (MWDB):** Enacted by the Massachusetts Governor and Legislature on December 2, 2015, the Board will assist the Governor in creating an integrated statewide strategic plan for workforce development

which will link workforce policies, education and training programs, and funding streams with the economic needs of Massachusetts and its regions and in complying with the provisions and requirements of WIOA Section 101. The new legislation can be found here: <https://malegislature.gov/Laws/SessionLaws/Acts/2015/Chapter142>

11. **In-Kind Contributions:** 66 Fed. Reg. 29639-29640 defines these types of contributions as donations from third parties that are not to be confused with contributions to the career center by partner programs of such things as space, equipment, staff, or other goods and services for which the partner program incurs a cost. In-kind contributions may include funding from philanthropic organizations or other private entities or through other alternative financing options, to provide a stable and equitable funding stream for on-going career center delivery system operations. WIOA 121(c)(2)(A)(i).
12. **Local Area:** A local workforce investment area designated by the Governor, under section 106, subject to sections 106(c)(3)(A), 107(c)(4)(B)(i), and 189(i).
13. **Local Workforce Development Board (local board):** The board created by the CEO pursuant to WIOA Section 107 with responsibility for the development of the local plan and for oversight of the workforce development activities in the local area.
14. **Additional Partner:** Per WIOA 121 (b)(2), an entity that carries out a program not identified as required under WIOA that is approved by the LWDB and the CEO may be included as a career center partner in a local area.
15. **Massachusetts Career Center Delivery System:** The career center delivery system is essentially a collaborative effort among public agencies, non-profit organizations, and private entities that administer workforce investment, educational, and other human resource programs to make the variety of services available under those programs more accessible to eligible job seekers and businesses.
16. **Massachusetts Career Center Operator:** An entity or consortium of entities designated in accordance with WIOA Section 121(d) to operate a career center site and to perform career center service delivery activities in accordance with all applicable federal, state, and local laws, regulations, rules, policies, plans, and the terms of this *MOU*.
17. **MassHire BizWorks:** MassHire BizWorks is a federal and state collaboration designed to enhance and align the services offered to Massachusetts businesses. It simplifies and coordinates efforts among agencies that work with businesses.
18. **Resource Sharing:** Per 66 Federal Regulation 29639, Resource Sharing is the cash and/or resources each partner will contribute to fund its fair share of costs for operation of the career center system. This can include “in-kind” contributions from third parties to partner programs. The LWDB, CEO and career center partners may fund the costs of infrastructure off career centers through methods agreed on by the LWDB, CEO and career center partners through Resource Sharing.
19. **Shared Customers:** Those job seekers that are receiving services through the MassHire system and one additional *MOU* partner, as defined by *Joint Partner Issuance* - [01-2018.pdf](https://mass.gov/files/documents/2018/03/20/01-2018.pdf)
20. **Specialized Service Centers:** A specialized service center of a core partner is defined as a local service center providing specialized services to shared customers such as assistive

technology, benefits counseling, and vocational counseling.

21. **Training Services:** Services to adults and dislocated workers as described in WIOA Section 134(c)(3). Per WIOA 134(c)(3)(D) these may include occupational skills training, including training for nontraditional employment, on-the-job training, incumbent worker training, programs that combine workplace training with related instructions, which may include cooperative education programs, private-sector training programs, skill upgrading and retraining, apprenticeships, entrepreneurial training, transitional jobs, job-readiness training, adult education and literacy activities in combination with a training program, or customized training.
22. **WIOA:** The Workforce Innovation and Opportunity (WIOA) Act amends the Workforce Investment Act of 1998 to strengthen the United States workforce development system through innovation in, and alignment and improvement of, employment, training, and education programs in the United States, and to promote individual and national economic growth, and for other purposes.
23. **WIOA Local Plan:** Per WIOA Section 108, the local plan is a comprehensive 4-year plan developed by each LWDB, in partnership with the chief elected official and submitted to the Governor. The plan shall support the strategy described in the *State Plan*. At the end of the first 2-year period of the 4-year local plan, each local board shall review the local plan, and the local board, in partnership with the chief elected official, shall prepare, and submit modifications to the local plan to reflect changes in labor market and economic conditions or in other factors affecting the implementation of the local plan. Plans identify the respective local area's current and projected workforce investment needs, the career center delivery system, performance standards, and strategies to address the workforce investment needs in consideration of performance standards per WIOA Section 116.
24. **WIOA State Plan:** The term "*State Plan*", used without further description, means a unified State plan under Section 102 or a *Combined State Plan* under Section 103.

ATTACHMENT E: MASSHIRE CAREER CENTER LOCATIONS



DEPARTMENT OF CAREER SERVICES

Find a MassHire Career Center Near You

Visit a MassHire Career Center for:

- Job search assistance;
- Career planning information;
- Workshops on job search techniques including interviewing, networking, and resume writing;
- Data on the current statewide and local job market; and
- Resources to help you find the right training opportunities;
- Tools to help you conduct an effective job search.

Greater Boston

MassHire Boston Career Center

1010 Harrison Avenue
Boston, MA 02119
(617) 541-1400, TTY #: (617) 442-3610

MassHire Downtown Boston Career Center

75 Federal Street, Third Floor
Boston, MA 02110
(617) 399-3100, 800-436-WORK (9675)

MassHire Metro North Career Centers

186 Alewife Brook Parkway, Suite 310
Cambridge, MA 02138
(617) 661-7867

(affiliated limited services)*

4 Gerrish Avenue
Chelsea, MA 02150
(617) 884-4333

100 TradeCenter, Suite G-100
Woburn, MA 01801
(781) 932-5500

MassHire Framingham Career Center

39 Grant Street
Framingham, MA 01702
(508) 861-7993

MassHire Norwood Career Center

128 Carnegie Row, Suite 109
Norwood, MA 02062
(781) 269-5494

Northeastern Massachusetts

MassHire Merrimack Valley Career Center

160 Merrimack Street, Suite 209
Haverhill, MA 01830
(978) 519-3762

420 Common Street, Second Floor
Lawrence, MA 01840
(978) 722-7000

MassHire Lowell Career Center

107 Merrimack Street
Lowell, MA 01852
(978) 458-2503, TTY #: (978) 805-4915

MassHire Lowell Young Adult Career Center**

115 Merrimack Street
Lowell, MA 01852
(978) 458-2503, TTY #: (978) 805-4915

MassHire North Shore Career Centers

70 Washington Street, First Floor
Salem, Massachusetts 01970
(978) 825-7200

(affiliated limited services)*

North Shore Community College
300 Broad Street, LE-102
Lynn, MA 01901
(781) 691-7450

MassHire North Shore Youth Career Center**

North Shore Community College
300 Broad Street, LE-139
Lynn, Massachusetts 01901
(781) 691-7435

Southeastern Massachusetts

MassHire Cape & Islands Career Center

372 North Street
Hyannis, MA 02601
(508) 771-JOBS (5627),
TTY #: (508) 862-6102

MassHire Greater Brockton Career Center

34 School Street,
Brockton, MA 02301
(508) 513-3400

MassHire Greater Brockton YouthWorks**

34 School Street, Lower Level
Brockton, MA 02301
(508) 584-9800

MassHire Fall River Career Center

446 North Main Street
Fall River, MA 02720
(508) 730-5000

MassHire Youth Connections**

139 South Main Street
Fall River, MA 02720
(508) 675-9245

MassHire Greater New Bedford Career Center

618 Acushnet Avenue
New Bedford, MA 02740
(508) 990-4000

MassHire Taunton Career Center

72 School Street
Taunton, MA 02780
(508) 977-1400

MassHire South Shore Career Centers

1515 Hancock Street
Quincy, MA 02169
(617) 745-4000

Central Massachusetts

MassHire North Central Career Center

100 Erdman Way
Leominster, MA 01453
(978) 534-1481, TTY #: (978) 534-1657

MassHire Southbridge Career Center

14 Mechanic Street, Suite 330
Southbridge, MA 01550
(508) 765-6430, TTY #: (508) 765-6437

MassHire Worcester Career Center

554 Main Street, Suite 300
Worcester, MA 01608
(508) 799-1600

Western Massachusetts

MassHire Franklin Hampshire Career Centers

101 Munson Street, Suite 210
Greenfield, MA 01301
(413) 774-4361, TTY #: (413) 772-2174

MassHire Holyoke Career Center

850 High Street
Holyoke, MA 01040
(413) 532-4900, TTY #: (413) 535-3098

MassHire Berkshire Career Center

160 North Street
Pittsfield, MA 01201
(413) 499-2220, TTY #: (413) 499-7306

MassHire Springfield Career Center

95 Liberty Street, Third Floor
Springfield, MA 01103
(413) 858-2800, TTY #: (413) 858-2800

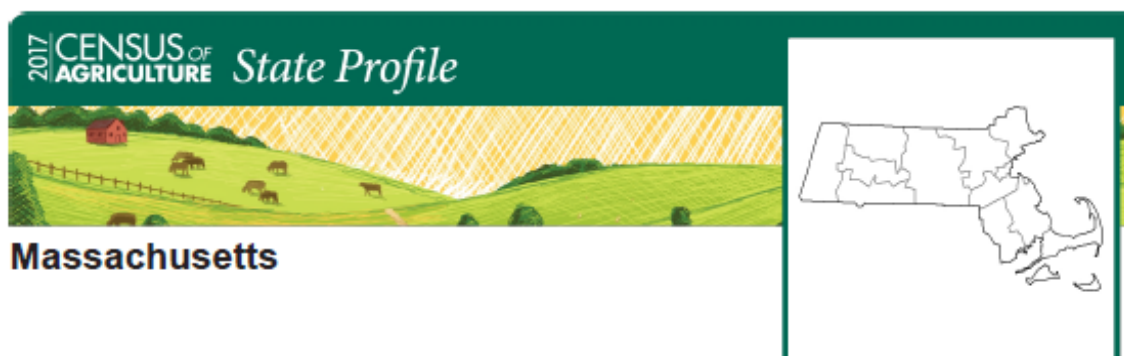
For more information about MassHire Career Centers, visit www.mass.gov/careercenters.

*Affiliated limited services - Contact the career center for hours of operation and services available.

**Youth-specific Career Center - For access to unemployment insurance assistance, please contact a full-service MassHire Career Center.

2066A English Rev. 07-14-23

ATTACHMENT F: CENSUS OF AGRICULTURE STATE PROFILE FOR MASSACHUSETTS

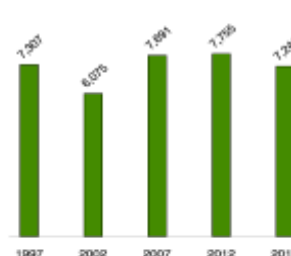


Massachusetts

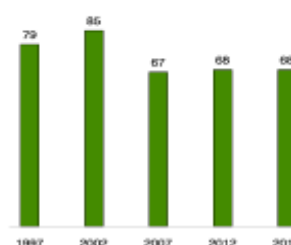
Total and Per Farm Overview, 2017 and change since 2012

	2017	% change since 2012
Number of farms	7,241	-7
Land in farms (acres)	491,653	-6
Average size of farm (acres)	68	+1
Total	(\$)	
Market value of products sold	475,184,000	-3
Government payments	4,004,000	-51
Farm-related income	70,388,000	-10
Total farm production expenses	492,665,000	-9
Net cash farm income	56,911,000	+44
Per farm average	(\$)	
Market value of products sold	65,624	+3
Government payments (average per farm receiving)	7,583	-27
Farm-related income	28,009	-3
Total farm production expenses	68,038	-2
Net cash farm income	7,859	+54

Number of Farms, 1997-2017



Average Farm Size, 1997-2017 (acres)



Farms by Value of Sales

	Number	Percent of Total *
Less than \$2,500	3,258	45
\$2,500 to \$4,999	752	10
\$5,000 to \$9,999	767	11
\$10,000 to \$24,999	774	11
\$25,000 to \$49,999	526	7
\$50,000 to \$99,999	405	6
\$100,000 or more	759	10

Farms by Size

	Number	Percent of Total *
1 to 9 acres	2,373	33
10 to 49 acres	2,535	35
50 to 179 acres	1,689	23
180 to 499 acres	548	8
500 to 999 acres	92	1
1,000 + acres	24	(Z)



United States Department of Agriculture
National Agricultural Statistics Service

www.nass.usda.gov/AgCensus

Massachusetts, 2017
Page 22017 CENSUS OF AGRICULTURE *State Profile*

Market Value of Agricultural Products Sold

	Sales (\$1,000)	Rank in U.S. ^b	States Producing item	(Z) Percent of U.S. agriculture sales
Total	475,184	47	50	
Crops	363,524	42	50	Share of Sales by Type (%)
Grains, oilseeds, dry beans, dry peas	5,388	47	50	Crops 77
Tobacco	5,733	9	18	Livestock, poultry, and products 23
Cotton and cottonseed	-	-	17	
Vegetables, melons, potatoes, sweet potatoes	102,061	25	50	
Fruits, tree nuts, berries	88,433	16	50	Land in Farms by Use (acres)
Nursery, greenhouse, floriculture, sod	139,740	26	50	Cropland 171,496
Cultivated Christmas trees, short rotation				Pastureland 46,341
woody crops	3,536	15	50	Woodland 194,189
Other crops and hay	18,633	44	50	Other 79,627
Livestock, poultry, and products	111,661	47	50	
Poultry and eggs	12,194	42	50	Top Counties: Land in Farms (acres)
Cattle and calves	11,147	45	50	Worcester 95,308
Milk from cows	45,336	39	50	Franklin 88,247
Hogs and pigs	2,098	40	50	Plymouth 60,036
Sheep, goats, wool, mohair, milk	2,305	41	50	Berkshire 58,647
Horses, ponies, mules, burros, donkeys	3,430	43	50	Hampshire 50,644
Aquaculture	29,402	16	50	
Other animals and animal products	5,749	37	50	

Total Producers ^a	12,778	Percent of farms that:	Top Crops in Acres ^d
Sex			Forage (hay/haylage), all 79,004
Male	7,206	Have internet access 84	Vegetables harvested, all 19,014
Female	5,572		Land in berries 14,994
Age			Corn for silage or greenchop 13,689
<35	1,082	Farm organically 3	Cranberries 13,555
35 – 64	7,381		
65 and older	4,315		Livestock Inventory (Dec 31, 2017)
Race			Broilers and other
American Indian/Alaska Native	29	Sell directly to consumers 25	meat-type chickens 17,663
Asian	95		Cattle and calves 36,574
Black or African American	166		Goats 7,632
Native Hawaiian/Pacific Islander	6		Hogs and pigs (D)
White	12,402	Hire farm labor 33	Horses and ponies 14,584
More than one race	80		Layers 155,008
Other characteristics			Pullets 10,139
Hispanic, Latino, Spanish origin	207	Are family farms 95	Sheep and lambs 13,310
With military service	1,102		Turkeys 21,227
New and beginning farmers	3,538		

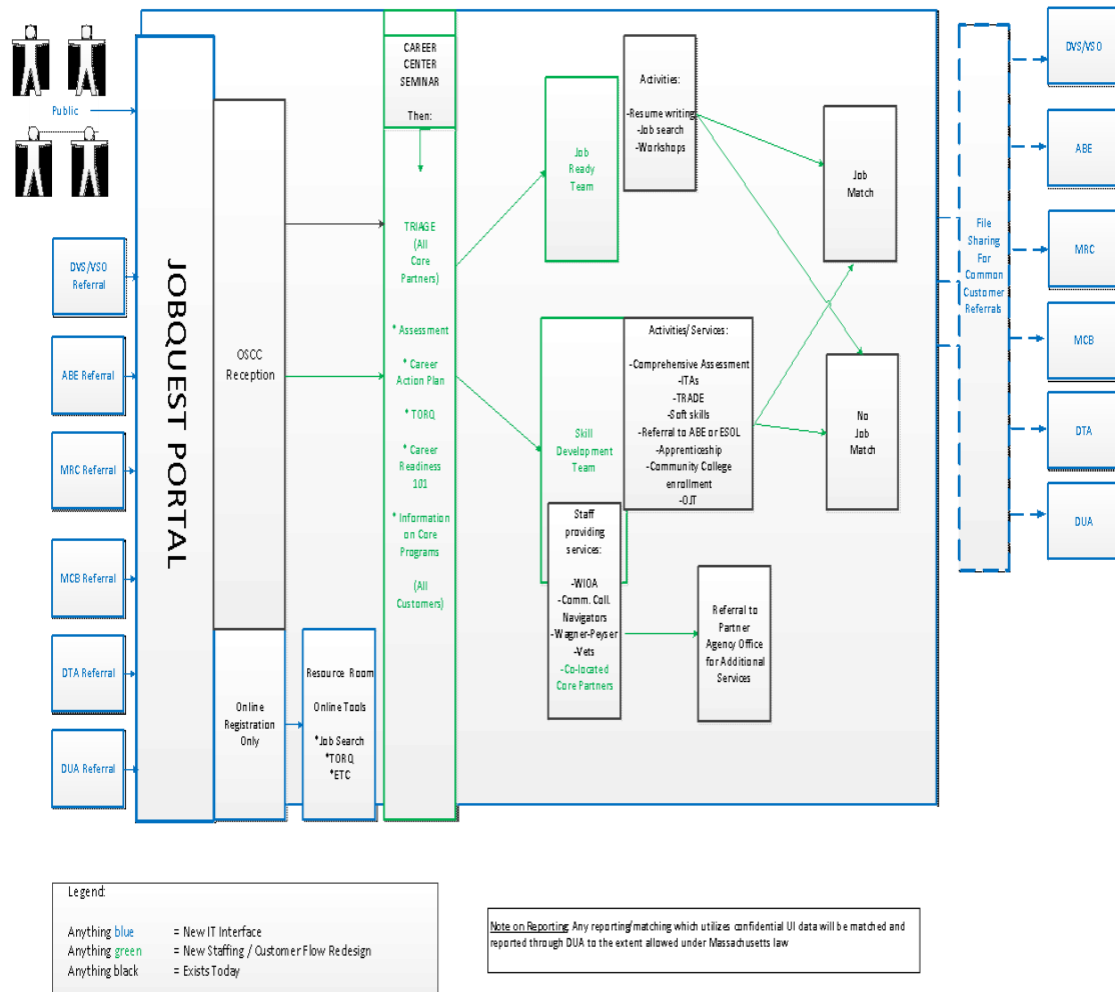
See 2017 Census of Agriculture, U.S. Summary and State Data, for complete footnotes, explanations, definitions, commodity descriptions, and methodology.

^a May not add to 100% due to rounding. ^b Among states whose rank can be displayed. ^c Data collected for a maximum of four producers per farm.^d Crop commodity names may be shortened; see full names at www.nass.usda.gov/go/cropnames.pdf. * Position below the line does not indicate rank.

(D) Withheld to avoid disclosing data for individual operations. (NA) Not available. (Z) Less than half of the unit shown. (-) Represents zero.

ATTACHMENT G: Integrated, technology-based job seeker flow chart at Career Centers (with Core Program partners)

Statewide customer flow to manage individuals from various referral sources who are triaged based on new, intensive skill assessment tools to Job Ready and Skill-Building Teams within the Career Center.



ATTACHMENT H: DEPARTMENT OF UNEMPLOYMENT ASSISTANCE

Unemployment Insurance SQSP Package Documents

- H1. *SQSP Transmittal Letter*
- H2. *Budget Worksheets/Forms*
- H3. *Corrective Action Plans (CAPs)*
- H4. *UI Program Integrity Action Plan (UI IAP)*
- H5. *Organizational Chart*
- H6. *SQSP Signature Page*



THE COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF LABOR AND WORKFORCE DEVELOPMENT
DEPARTMENT OF UNEMPLOYMENT ASSISTANCE

MAURA HEALEY
GOVERNOR

KIM DRISCOLL
LIEUTENANT GOVERNOR

LAUREN E. JONES
SECRETARY

KATIE DISHNICA
DIRECTOR

October 31, 2025

Danielle Worthen-Ramos
Acting Regional Administrator
U.S. Department of Labor/ETA
25 New Sudbury St
Room E-350
Boston, MA 02203

Dear Ms. Worthen-Ramos,

Enclosed is the Massachusetts Department of Unemployment Assistance State Quality Service Plan (SQSP) for Fiscal Year 2026. Massachusetts is submitting the biennial year plan for your review and approval. This package transmits the following items:

- FY 2026, State Plan Narrative, including Assurances
- FY 2026 Integrity Action Plan
- SF 424 – Application for Federal Assistance
- SF 424B – Assurances
- Organizational Charts

Please note the SQSP FY2026 Correction Action Plan Workbook for the Alternate Year has not been received from ETA to date therefore it cannot be submitted with this package.

All items have been prepared in accordance with the instructions in Employment and Training Handbook No. 336, 18th Edition, Change 4, and the UI Program Letter No 15-25 issued on August 21, 2025, initiating the FY 2026 SQSP process.

If you have any questions concerning the SQSP, please contact me at (617) 626-5132.

Sincerely,

A handwritten signature in black ink, appearing to read "Katie Dishnica".

Katie Dishnica, Director
Massachusetts Department of Unemployment Assistance

U.S. Department of Labor

Employment and Training Administration
John F. Kennedy Federal Building
Room E-350
Boston, Massachusetts 02203



Reply to the attention of: R1-DWR-BL
Serial #FY26-117

February 5, 2026

Ms. Lauren Jones
Secretary
Massachusetts Executive Office of Labor & Workforce Development
One Ashburton Place
Suite 2112
Boston, MA 02108

Dear Secretary Jones:

I am writing to acknowledge receipt of Massachusetts Executive Office of Labor & Workforce Development's (EOLWD) Alternate Unemployment Insurance (UI) Fiscal Year 2026 State Quality Service Plan (SQSP) and Integrity Action Plan, effective from October 1, 2025, to September 30, 2026. We appreciate the submission and recognize the effort involved in developing and executing the strategies and Corrective Action Plans (CAPs) outlined in the SQSP. These materials will be retained as part of the agency's official record for the fiscal year.

Following past practice, the Regional Office will use the SQSP to identify actions your agency will take to improve performance and evaluate UI program accomplishments based on those actions. We look forward to working with EOLWD on these initiatives.

To assist us in tracking and analyzing performance improvement on the CAPs, please provide quarterly written updates on the specific milestones planned and actions taken to accomplish EOLWD's proposals for achieving corrective action goals. Enclosed is the Guide for SQSP Quarterly Progress Reports that provides additional reporting details. Please submit SQSP quarterly updates to R1-SQSP@dol.gov within 60 days following the end of each quarter.

If you have any questions or concerns about the content of the quarterly update, please contact Ms. Brisa Lopez at lopez.brisa.d@dol.gov.

Sincerely,

A handwritten signature in black ink, appearing to read "D. Worthen-Ramos".

Danielle Worthen-Ramos
Acting Regional Administrator

Enclosure 1: Guide for SQSP Quarterly Progress Reports

Enclosure 2: SQSP Signature Page

cc: Katie Dishnica, UI Director

Guide for SQSP Quarterly Progress Reports

ET Handbook No. 336, 18th Edition, Change 4, *Unemployment Insurance (UI) State Quality Service Plan (SQSP) Planning and Reporting Guidelines*, requires state workforce agencies to submit a quarterly progress report for their SQSP to the ETA Regional Office after the end of each reporting quarter.

The information gathered through the report must include a brief narrative description of the progress of each CAP and corresponding milestone(s) and the most recent performance levels achieved. Each report must include the progress made on the milestone since the last report. The milestone update must specify all finished work and include the completion dates for each milestone phase, and, if relevant, the implementation dates for any new process. In addition to the implementation status, the update must contain all actions that are completed ahead of schedule, on schedule, or behind schedule. Explanations of delays in implementing the planned activities must address problems that caused the delay and a new timeline (completion date), if applicable, for completing the activity.

Through the quarterly reports, states may request to be relieved of submitting an update on a CAP if performance improves in the SQSP period. To be considered for the relief, performance data must substantiate that the state has:

- Achieved or exceeded the minimum level of performance for the measure for the most recent 12-month period; or
- Achieved or exceeded the minimum level of performance for the nine most recent consecutive months (monthly reports) or three most recent consecutive quarters (quarterly reports).

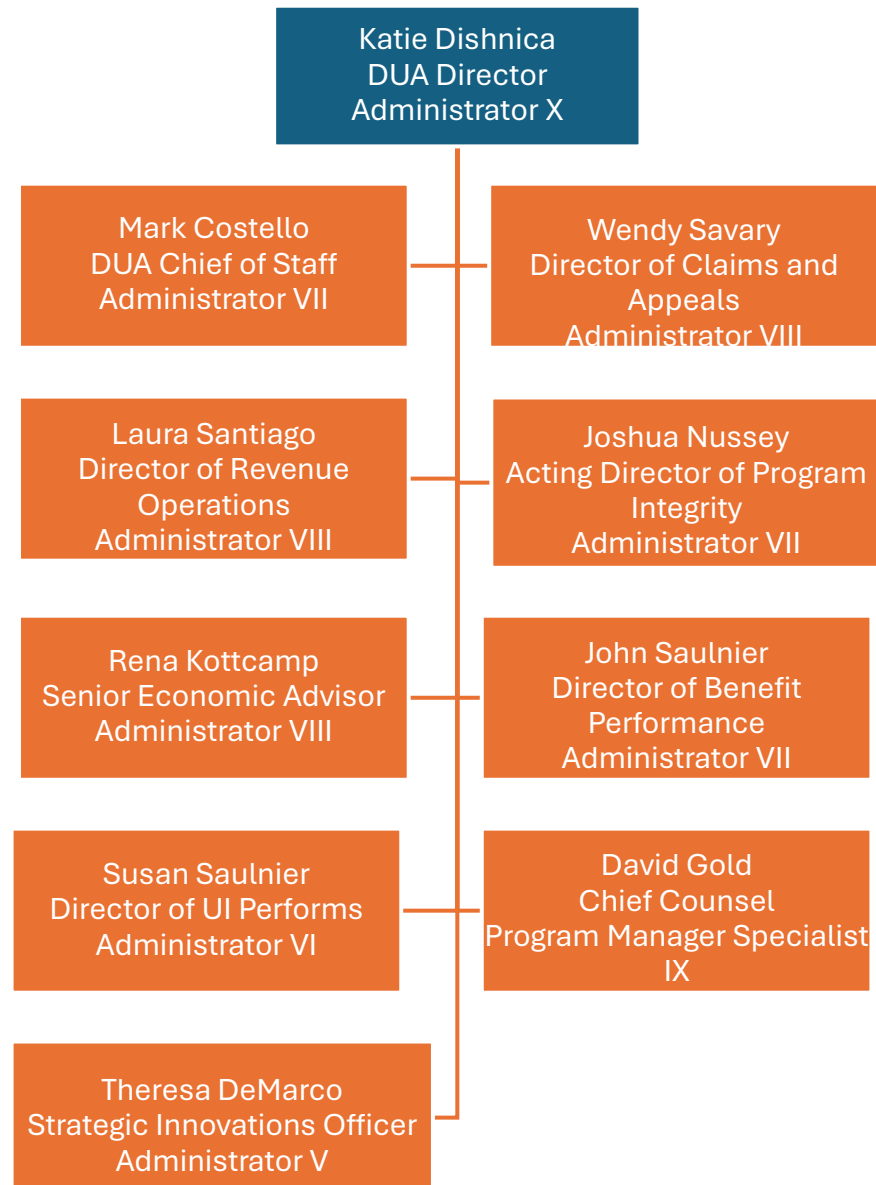
The Regional Office will be responsible for assessing the progress of each CAP and offering timely assistance to the state on any specific issues that arise. States must use the SQSP Workbook to submit the updates. Unless requested by the Regional Office, states are not required to submit quarterly updates for UI program deficiencies addressed in the SQSP Narrative.

The SQSP quarterly updates must be submitted via e-mail to R1-SQSP@dol.gov and your UI Federal Project Officer, and should be sent within 60 days following the end of each quarter.

- Quarter Ending December 31, 2025, due March 1, 2026
- Quarter Ending March 31, 2026, due May 30, 2026
- Quarter Ending Jun 30, 2026, due August 29, 2026
- Quarter Ending September 30, 2026, due November 29, 2026

Within 30 days of receiving the quarter update, the Regional Office will review and accept the report or contact the state if clarifications or additional information is needed. The Regional Office will notify the state when the quarterly update report is accepted via email notification. The state must continue to submit updates in each ensuing quarter until the SQSP period ends.

EOLWD – DUA Director’s Office - Oct 2025



State Quality Service Plan (SQSP) Integrity Action Plan (IAP)

MASSACHUSETTS – Fiscal Year (FY) 2026

Accountable Agency Official(s).

List the person or persons accountable for ensuring integrity in the state's unemployment insurance (UI) program.

Name: Joshua Nussey

Title: DIRECTOR OF PROGRAM INTEGRITY

Email: joshua.s.nussey@mass.gov

Phone: 617.863.6091

(Topic #1) – Ensuring UI program integrity by assessing and evaluating fraud risks, implementing and maintaining an array of sufficient controls to effectively mitigate the likelihood and impact of fraud, and reducing improper payments.

The Massachusetts Department of Unemployment Assistance (MADUA) continues to value integrity and strengthen equity in our assessment of fraud risks to not only prevent fraudulent claim activities, but also assure proper payment to those filing valid claims and meeting the ID verification requirements. Throughout the pandemic and still today Massachusetts is at high risk for fraud attacks and attempts to fraudulently file claims and obtain UI benefits. Fraudulently filed claims are usually associated with data breaches outside of the MADUA UI online system, which then uses stolen PII to file claims. Hackers will create imitation UI online websites or other phishing scams which ask users to provide passwords or other personal information to gain access to UI accounts to divert payment to fraudulent banking accounts. MADUA works continuously to ensure proper payment of benefits to valid claim filings while balancing the investigation of potential fraudulent or hacked UI accounts.

Because of high claim volume and lack of adequate resources, MADUA cannot have staff manually review every initial claim filing or each change to the UI account/claim record. All of which was taken into account when MADUA created our modernized unemployment system (EMT), which launched at the beginning of May 2025.

MADUA's approach includes a combination of automated processes, outside vendor analysis and staff investigation.

MADUA uses an outside vendor for fraud analytics which applies weighted scoring to each claim application to determine the validity of a claim application. Through the fraud analytics software MADUA can recognize trends in claim filing and track submissions which include duplicate or suspicious data points. These findings allow MADUA to work with the vendor to update scoring criteria and parameters for flagging data points in the submissions. Additionally, within our new EMT system, we

have integrated the vendor conducting fraud analytics directly into the process, quickening the analysis and streamlining the review process.

Depending on the results of the fraud analytics, MADUA may also require a claimant to go through an identity quiz, or ID proofing process. The identity quiz is an on-screen quiz where a claimant is asked a series of questions made up of a combination of publicly available data and past claim details. The ID Proofing consists of the USPS verification offered by USDOL. These processes have been updated in EMT to streamline our identity verifications, while still ensuring that all claims filed are valid requests for UI benefits. and providing faster outcomes to valid claimants.

While MADUA continues to address the fraud risks and improper payments associated with ID theft, stolen identities and hacked accounts, MADUA has also refocused resources on claimant attributed fraud for issue such as benefit year earnings. In EMT we have integrated these processes and continued to adapt our criteria for the detection and creation of a benefit year earnings case, to avoid false positives in crossmatches while ensuring we are reviewing the cases most likely to lead to detection of improper payments.

[Click here to enter text.](#)

- In evaluating fraud risks, states should consider both eligibility fraud risks and identity (ID) fraud risks.
- **State actions to evaluate UI fraud risks and implement and maintain sufficient controls to effectively prevent fraud and reduce improper payments, including state progress in developing their own state-specific antifraud strategy.**

MADUA deploys a multi-layered anti-fraud strategy for ID verification, which has been tweaked slightly after the launch of our new EMT system in May 2025, to account for better integration with our fraud analytics vendor. The first step is having all initial claims processed through fraud analytics. From there, the claim is evaluated based on standards MADUA set in conjunction with our vendor, consisting of a combination of fraud markers, comparisons with public databases, comparisons with past claim details and comparisons with other client records. That evaluation leads to a recommendation; a claim can either pass, fail or require secondary verification.

A passed claim contains zero to an extremely low fraud risk and allows for processing of the claim. Claims that require secondary verification can receive an identity quiz they can complete onscreen from their account or over the phone with staff, or require ID Proofing, either with USDOL's USPS ID verification process, or through providing their documents directly to DUA staff for review, with any claimant who does not adequately complete this process receiving an appealable determination. A failed claim will be denied, but will receive an appealable determination.

A new function of this integration with our fraud analytics vendor is to allow for a rescoring and secondary analysis of a claim anytime critical contact or payment information is updated. This, in conjunction with the fact that MADUA continues to lock in claim payment methods after the filing of an initial claim, has led to a nearly 100% reduction in the issues we had experienced in the past with legitimate claims being hacked by bad actors. Staff review of changed payment

methods along with this re-scoring has made it extremely difficult for a fraudster to access and change a payment method without a flag being raised, though we continue to monitor this to ensure instances of hacked accounts remain rare.

MADUA is constantly working with our vendor to adjust scoring and other fraud flags based on trends identified by fraud investigators. This team meets with the vendors to discuss these findings to make changes in risk assessment and scoring to account for the findings, while allowing a quicker and better customer experience for legitimate claim applicants.

- Reference Table 4 of “A Framework for Managing Fraud Risks in Federal Programs” at <https://www.gao.gov/assets/gao-15-593sp.pdf>, for the key elements of an antifraud strategy.
- In addressing fraud risks, states should rely on an array of controls, tools, and strategies to mitigate fraud and improper payment risks. There is no single, stand-alone, resource to fully address these issues. It requires a multi-layered approach.

State use of tools, services, strategies, process improvements, and/or procedural changes adopted by the state to combat fraud, verify identities, and enhance recovery efforts. States must identify which tools, solutions, and service provider(s) are used in the state’s fraud management operations, including but not limited, to the following areas: data analysis, risk-based ID verification, fraud prevention and detection, and cybersecurity.

MADUA has a layered strategy to combat fraud and prevent improper payments.

- FIVS: Fast Identification Verification System (FIVS) is a data analytic tool and case management system which allows MADUA to analyze UI accounts and claim application data. FIVS receives data from every initial claim filed in our online system. The data is reviewed and compared to historical data from MA claim records and other clients to look for fraud markers. The review results in a risk score, which is used to determine the next steps. The risk score will determine if the claim submission passes, fails or is flagged for further investigation. This overall risk score combined with the outcome from the ID proofing will determine the final outcome for the claim submission.
- Login.gov-USPS is a USDOL recommended ID proofing vendor which requires all claimants who file an initial claim to present photo ID to establish their identity. Currently, MADUA utilizes only the USPS solution for ID Proofing. Any claimant requiring additional verification in person at a USPS facility is automatically registered by our modernized UI system into the Login.gov database and provided a bar code to present at the USPS facility. The results are transmitted from USPS back to the EMT system for resolution. If an applicant isn’t able to receive a pass result or doesn’t complete the ID proofing process an appealable denial is issued.

- Lexis Nexis (Accurant): The Lexis Nexis Accurant is used by MADUA staff to look up information associated with a person's SSN. This can be used for out of state photo IDs and verification of passports. The software allows staff to research identities and photo IDs to validate the identity.
- RMV/Atlas: MADUA staff have access to the MA RMV database to verify state photo IDs. The software allows staff to research identities and photo IDs to validate the identity. This on demand information allows the investigator to establish a digital data identity for UI applicants.
- MADUA processes all user accounts through the Social Security Administration in order to verify UI applicants when filing an initial claim. This effort is an automated process verifying a person's SSN, name and date of birth.
- MADUA participates in the Integrity Data Hub (IDH) via NASWA to share data among states in an effort to reduce the improper payment rate, specifically fraud related overpayments.
- Our modernized UI system is included as part of a statewide single sign-on to allow users to have one sign on for all Massachusetts related accounts. MFA is required to log into the single sign-on system, in order for a claimant to access their UI claim.

A dedicated vendor to analyze improper payment data to ensure senior management has the information needed to be impactful. MADUA is actively working with our debit card vendor and financial institutions and the OIG to pursue people who commit identification fraud.

MADUA continues to refer overpaid claimants to both federal (IRS) and state tax intercept (DOR); MADUA continues to submit federal tax intercepts to TOP and collects on referred debt at both the federal and state level. Previous timing issues the state experienced in submitting TOP referrals coming out of the pandemic are no longer being experienced, as the file is now submitted and updated on a weekly schedule.

- Provide details regarding the state's tools and services used to identify and prevent fraud.
- Provide details on overpayment recovery efforts including:

- Actions with banks, financial institutions, and with Federal law enforcement's forfeiture and seizure efforts.
- How the state is using the Treasury Offset Program (TOP) for benefit overpayment recovery, how the state is ensuring covered debts are being submitted, and any barriers/challenges in working with TOP.

State use of UI Integrity Center resources, with a particular focus on state connection to the Integrity Data Hub (IDH) and use of its datasets to cross-match unemployment compensation (UC) claims and aid in the prevention and detection of fraud and improper payments (*see* Training and Employment Notice (TEN) No. [24-21](#));

All Program Integrity staff are required to complete NASWA's online fraud training course. Non-PI staff who work with potential fraudulent claims or cases of ID theft are also encouraged to take this training. MADUA submits initial claim data to the IDH and has signed the latest IDH agreement including participation in the employer integrity data hub being launched by NASWA/IDH. MADUA has utilized the IDH fraud alerting system to identify fraud activities related to fictitious employers and other suspicious activities.

When our modernized unemployment system was launched in May 2025, MADUA integrated some aspects of the IDH directly into the new system. Specifically, all initial claim data is automatically reported to the IDH, to increase the number of submissions being made and properly reflect the number of claims filed.

The IDH result is also viewable directly within our new EMT system. This allows for faster review of IDH results and recognition of flagged data by MADUA staff on a claim. We expect to further leverage these IDH results moving forward, in analyzing potential fraud on an account.

Other IDH processes were not able to be integrated directly into our new system. So MADUA staff also frequently log into the IDH system itself to utilize the BAV as well as review all fraud reports being submitted by other states.

MADUA hopes to continue to update our IDH integration to provide not only initial, but all claim data, including continued, additional and reopened claims.

- Discuss the state's connection to the IDH, including frequency of IDH use.
 - Does the state submit initial and continued claims for IDH cross-matching? If not, what is preventing the state from sending claims?
- If the state has not executed the updated IDH Participation Agreement – Version 6.0 amendments for the two new Do Not Pay data sources and services (*see* TEN No. [26-24](#)), include plans and an anticipated timeline for executing the amendments.

- If the state is not connected to the IDH and/or is connected but not regularly submitting UI claims data through a webservice/real-time connection to IDH, provide details on the state's plan for how to increase usage and an anticipated timeline to:
 - Connect to the IDH.
 - Increase frequency of IDH use.
 - Fully leverage IDH capabilities.
 - Update the IDH connection to a webservice/real-time connection.
 - Identify barriers/concerns preventing full utilization of the IDH.
- Discuss the state's use of the UI National Integrity Academy's virtual trainings and/or eLearning lessons (available on the NASWA Learning platform (<https://www.naswa.org/learning>)).
- Discuss the state's use of UI Integrity Knowledge Exchange Library resources, including the Behavioral Insights Toolkit (see TEN No. [15-21](#)).
- Discuss the state's participation in State Consultative Services.
- **State use of required and recommended integrity controls and overpayment recovery activities as outlined in sections 4.b.ii and 4.b.iii. of UIPL No. [11-23](#), including any additional effective cross-matching and overpayment recovery activities and identified best practices.**

MADUA participates in the ETA mandatory crossmatches including National Directory of New Hires cross-match (NDNH), State Directory of New Hire cross-match (SDNH) and matches quarterly wage records to detect potential incidents of working while collecting UI benefits. Parameters are applied to returned new hire records to determine probability of fraud. Parameters are based on elements of the new employment and the UI claim record. Parameters can include weeks claimed after the hire date, wages earned during the applicable quarter(s), history of overpayments and/or working and collecting and other parts of the claimant's UI history.

Claims filed which indicate the claimant is a non-citizen are verified in Systematic Alien Verification for Entitlement (SAVE) to confirm work authorization status. MADUA also manually crossmatches against county, state and federal incarceration records and participates in PUPS to look for incidents of availability.

Additionally, MADUA crossmatches against other state UI records participating in the Interstate Benefits crossmatching through ICON. MADUA participates in NASWA's Integrity Data Hub (IDH) providing UI claim data to be matched against other states for flag duplicates or other suspicious markers when crossmatched against other state's UI records. MADUA is also participating in the employer integrity hub.

All initial claims are processed through fraud analytics to score the UI account and application. This software matches RMV and other public records databases, including deceased records. Updates to UI account and banking information are monitored for flagged after the initial application is submitted. Suspicious IP addresses and other PII used to submit and update UI account are monitored. Fraud investigators manually research and review accounts when these changes occur and contact claimants to confirm changes.

A single-sign on (SSO) process was implemented in EMT, with a claim needing to match the data on the SSO account, which requires users to provide their SSN and password and then go through multi-factor authentication, which sends a code to the email address or cell phone number on the UI account, or the use of a verified authenticator app.

MADUA recovers benefit debt through all the usual repayment methods including offset of benefits, payment plans and referrals. Recovery measures include participation in IRORA to offset and receive offset of benefits from other states. MADUA participates in the Treasury Offset Program (TOP) and refers eligible debt to MADOR for intercept of state tax refunds. MADUA works with banking institutions and our debit card vendor to investigate funds paid to potentially fraudulent accounts and to recover any funds issued to those accounts found to be fraudulent.

- Provide details regarding the state's use of each cross-match/integrity control and overpayment recovery activity (required and recommended) as outlined in UIPL No. [11-23](#). Include details on the frequency of crossmatch/integrity controls use (*e.g.*, conducted on all initial claims, all continued claims, only when suspicious activity is identified?) and frequency of overpayment recovery activities.
- Cross-matches/integrity controls and recovery activities include:

Cross-matches/Integrity Controls

- ID Verification;
- National Directory of New Hires (NDNH);
- Quarterly Wage Records Cross-match;
- Systematic Alien Verification for Entitlement (SAVE);
- Referral of UC fraud, waste, abuse, mismanagement, or misconduct to the Department of Labor's Office of Inspector General (DOL-OIG);
- UI Integrity Center's IDH;
- Digital Authentication, such as Multifactor Authentication (MFA);
- Device Fingerprint/Reputation Management;
- Fraud Risk Scoring (*i.e.*, Case Management Prioritization);
- Comparisons and cross-matches that detect shared characteristics;
- Social Security Administration cross-matches (*i.e.*, Unemployment Insurance Query (UIQ), Prisoner Update Processing System (PUPS), Death Master File);

- Federal, state, and local incarceration cross-matches;
- Deceased Records cross-matches;
- Vital Statistics cross-matches;
- State Directory of New Hires (SDNH);
- Department of Motor Vehicle cross-match;
- Interstate Benefits (IB) cross-match;
- State Identification Inquiry (SID) and IB8606 enhancements made to the Interstate Connection (ICON) network cross-match;
- Use of a unique identifier to identify claimants instead of using the full SSN;
- Fictitious employer cross-matches;
- Periodic IT security assessments and audits;
- Adequate internal controls to protect the integrity and security of state assets;
- Implement a cross-functional integrity task force.

Overpayment Recovery Activities

- Benefit Offsets;
 - Treasury Offset Program (TOP);
 - Cross Program Offset Recovery Agreement (CPORA);
 - Interstate Reciprocal Offset Recovery Arrangement (IPORA);
 - Negotiating repayment plans;
 - Accepting repayments through various methods (*e.g.*, online, via debit/credit card);
 - State Income Tax Offset Program;
 - Wage garnishments;
 - Property liens and assessments;
 - Offsets of lottery winnings, homestead exemptions, and other benefits;
 - Active participation in probate and/or bankruptcy proceedings;
 - Skip tracing;
 - Work proactively and collaboratively with banks and financial institutions;
 - Civil actions;
 - Credit bureau referrals;
 - State/federal prosecution;
 - Penalties and interest on overpayments in compliance with state and federal law;
 - Collection agency referrals;
 - Implementing a voluntary fraud self-disclosure program;
 - Other recovery methods as determined by state law or policy.
- Identify any additional integrity controls or recovery activities the state uses that are not listed in Section 4.b. of UIPL No. [11-23](#).
 - Provide promising practices.
 - Identify challenges with cross-matches or in overpayment recovery activities.
 - If the state does not currently use one of the integrity controls or recovery activities listed UIPL No. [11-23](#), provide the state's plan and anticipated timeline to request and obtain access to the cross-match/integrity control or to implement the overpayment recovery activity.

Note: If the state does not plan to obtain access to a cross-match/integrity control or implement a specific recovery activity, please explain.

- **State use and employer participation in State Information Data Exchange System (SIDES)** (*see* Section 5 of TEN No. [12-16](#)).

MADUA has implemented 3 SIDES modules; Separation Information, Earnings Verification, and Additional Fact Finding (will only be used for requesting additional fact finding for Separation and Earnings issues). There are currently no plans to add additional modules.

MADUA onboarded three business partners in July 2025, which allowed the agency to gather and implement feedback prior to SIDES being available to all employers and TPAs. In October 2025, SIDES was implemented for all employers. MADUA is considering options to promote SIDES to employers to try to increase participation.

Not all separation issues are available in SIDES. Employers will still need to use the Unemployment Services for Employers portals to respond to some fact-finding questionnaires.

- Provide details on the state's current usage of SIDES.
 - If the state does not currently use all available SIDES exchanges, provide the state's plan for how to connect to all SIDES exchanges and an anticipated timeline to implement each SIDES exchange. For more information on SIDES reference <https://www.naswa.org/uicides>.
 - Identify any barriers to participation in a SIDES exchange(s), either in state promotion or in employer adoption.
- **(Topic #2) – State plans and actions to address the state's top three improper payment root causes in the Payment Integrity Information Act (PIIA) 2024 performance period.**

Based on PIIA 2024, the top three MADUA improper payment root causes are worksearch, benefit year earnings and able/available. MADUA continues to struggle with improper payments

MADUA work search criteria includes activities which will enhance a recipient's rapid reemployment as outlined in UIPL 17-19. MADUA worksearch requires Registration for work and reemployment services with a Career Center and participation in at least three worksearch activities per week.

- Completing a job application in person or online with employers who may reasonably be expected to have openings for suitable work
- Mailing a job application and/or resume, as instructed in a public job notice
- Making in-person visits with employers who may reasonably be expected to have openings

- Sending job applications to employers who may reasonably be expected to have openings for suitable work
- Interviewing with potential employers in person or by telephone
- Registering for work with private employment agencies or placement services
- Using the employment resources available at One-Stop Career Centers that may lead directly to obtaining employment, such as:
 - Obtaining and using local labor market information
 - Participating in skills assessments for occupation matching
 - Participating in instructional workshops
 - Obtaining and following up on job referrals from the Career Center
 - Attending job search seminars, career networking meetings, job fairs, or employment-related workshops that offer instruction in improving individuals' skills for obtaining employment
- Using online job matching systems, including the Massachusetts One-Stop Employment System (MOSES)
- Reporting to the Union Hall, if this is your primary work search method
- Using other job search activities such as reviewing job listings on the internet, newspapers or professional journals, contacting professional associations, networking with colleagues or friends

To combat improper payments due to a failure to meet worksearch requirements, since the time of the launch of our new EMT system, messaging has continually been sent to claimants about the worksearch requirements. And MADUA has also required claimants to provide worksearch details to submit their weekly certification. The expected result is that this increase emphasis on the worksearch requirements will educate claimants in those requirements and keep them at the forefront throughout the duration of their claim, along with allowing staff to better analyze worksearch errors leading to improper payments. It will also provide an easy resource for claimants to reference a past worksearch, if asked to provide details for a specific week, all of which will hopefully help to reduce improper payments occurring due to the lack of worksearch detail provided.

or benefit year earnings, we've experienced two main challenges; the first is has been a lack of staff available to review new hire reporting, since we have had so many resources devoted to Identity Verification. The second has been getting accurate and timely responses to fact finding, particularly employer wage confirmations.

But MADUA is continuing to address these issues to increase the efficacy of new hire and earnings reviews. The enhancements made to our IDV process at the rollout of our new EMT system, has made it much less labor intensive. This has allowed us to increase the staff primarily tasked with the review of new hire and quarterly wage reporting. Since May 2025 we have nearly doubled the staff whose sole focus is to review earnings issues and we have continued to train additional staff to aid the effort as

well. This has allowed us to increase the number of issues being reviewed and along with requiring less time for adjudication.

In regards to getting more and accurate employer responses, MADUA has implemented the SIDES reporting system to give employers and TPAs an easier and familiar avenue for providing wage and employment information. Additionally, at the rollout of our new system, MADUA engaged in a lot of outreach to employers to keep them apprised of all changes coming and advocate for providing fact finding responses in a timely and complete manner.

For Able and Available issues, we have struggled in the past with getting proper and timely prisoner information, along with adjustment staff identifying able and available issues at the initial claim level. To combat those problems, MADUA is working to integrate the PUPS system into our new EMT system and has continued to provide additional training to adjustment staff so to ensure correct determinations are being made at the outset of a claim.

- Identify the state's top three improper payment root causes.
 - Explain the state's challenges in reducing improper payments in the top three root cause categories.
 - Discuss the state's plan to reduce improper payments in each root cause category.
- **(Topic #3) – State coordination and collaboration with the DOL-OIG and other state and Federal law enforcement agencies to investigate and prosecute UI fraud and recover overpayments. The response should also include information on the state's plans to continue providing all confidential UC information to DOL-OIG for purposes of both investigating fraud and performing audits.**

MADUA meets quarterly to discuss referred cases with the AG. MADUA attends DOL-OIG calls and meetings and cooperates to provide any requested materials and all levels of federal and state law enforcement.

MADUA's PI team works to refer cases to the OIG/AG and other agencies when detected, while DUA's Revenue Department continues to investigate cases of employer fraud, specifically Fictitious Employer cases, while providing additional referrals to the OIG/AG for potential prosecution.

(Topic #4) – State plans to strengthen program integrity in UI tax operations, including current activities and plans to identify and prevent worker misclassification, State Unemployment Tax Act (SUTA) Dumping, fictitious employer schemes, and development/use of effective employer audit strategies (*i.e.*, use of remote audits).

MADUA is participating in NASWA's new employer integrity data hub (IDH). MADUA plans to post additional positions to build our tax integrity and revenue enforcement. This team would review employer accounts to detect fictitious employer activities and work to collect revenue debt.

Currently, identification of fictitious employers and SUTA dumping is a function of the employer liability unit within the Revenue Department. Due to the influx of fictitious employers, DUA implemented a business process change where retroactive employer registrations are held pending a review of the validity of the employer registration. If the employer cannot be verified, the registration is not processed, and the account marked as fraud. To strengthen program integrity, we are currently working on creation of a new tax integrity unit within the Revenue Department. This unit's main functions will include identification of fictitious employer accounts and SUTA dumping schemes. We are working towards completing hiring and training of the new unit by 2025 Q2.

There are some changes MA DUA implemented with modernization of tax functionality in September 2023 including 1. An audit package that fully supports remote audits and 2. Misclassified worker status investigations are now a function of the Revenue Audit team; Following the status investigation, if needed, employers are set up for a full audit so MA DUA can identify any other misclassifications or other findings. We also continue to work on updated procedures and staff training for the Revenue audit team which we are aiming to complete by 2024 Q4.

The Revenue department also continues to work with the COTS developer on implementation of enhancements to new system including a crossmatch with MA DOR for FEIN validation, implementation of NASWA's new EDM functionality and development of new reports needed for the new Tax Integrity Unit.

In December 2024, the DUA Revenue Department officially established a new Tax Integrity Unit focused on combating employer fraud, review of retroactive employer registrations, and prevention of fraudulent attempts to access legitimate employer accounts. This unit was fully staffed as of March 2025. In June 2025, the unit sent their first three case referrals to the MA Attorney General's office for investigation. As of September 2025, the unit has closed 281 fictitious employer accounts and prevented over 600 attempts to register a fictitious employer account. We continue to explore future enhancements to support this unit's work such as a new interface with DOR and improvements to the fraud scoring model.

In January 2025, we also issued updated audit procedures to support a fully remote audit model and retrained audit team members. Functionality to support status investigations of misclassified workers launched with the new benefit system in May 2025. This represents a significant upgrade from the legacy system where this functionality was entirely manual. We continue to explore additional enhancements to support investigations such as the consumption of a 1099 IRS extract.

➤ Identify current activities and plans to address:

- Worker Misclassification
 - SUTA Dumping
 - Fictitious employer schemes
- Development/use of effective employer audit strategies (including, but not limited to, use of remote audits).
- **(Topic #5) – State plans and actions to strengthen internal security and ensure that all appropriate internal controls and processes are in place and are adequate to assess internal risks and threats, ensure program integrity, and minimize program vulnerabilities (see UIPL No. [14-17](#)).**

MADUA continues to monitor agency procedures surrounding federal tax information (FTI) to ensure we remain in compliance with security measures put in place in prior SSA audit.

In addition, as a product of the launch of MADUA's EMT system in May 2025, repayment check scanning and deposits were taken over by MADUA's Collections Department. As a result of this change, this unit was given a secure office where all check scanning could be completed, preventing unauthorized access.

- **(Topic #6) – State plans and actions to evaluate the effectiveness and equity of fraud prevention and detection, ID verification, and improper payment reduction activities. The state should include strategies to ensure that processes used to detect and prevent fraud are effective, and do not limit the ability for a legitimate claimant to apply for and, if eligible, receive UC. States implementing or using facial recognition technology in their ID proofing processes must also report findings from bias testing and provide updates on efforts to mitigate biases or barriers in this section of the IAP.**

All initial claim applications are processed through the same initial workflow to verify identity, with a secondary step that ensures faster processing cases deemed less likely to be involved with fraud. MADUA's Program Integrity team constantly monitors fraud trends and works with FIVS to adjust parameters for scoring. This ongoing relationship allows MADUA to continuously evaluate risk scoring to assure integrity in the results to improve scoring and more effectively make determinations regarding identity. Like all states, MADUA continues to struggle with timeliness due to ID verification. We are always balancing the need to properly pay benefits against timeliness. But in our EMT system, we have made several changes to try to combat that, chiefly putting claims with less fraud risk through a quicker verification process and automating claimant enrollment in USPS, for any claimant required to visit a USPS facility to verify their identity, to lessen the processing time in those cases. Previously, claimants could take up to 5 days to enroll themselves, but now they are enrolled instantly and provided a copy of the barcode they need to have scanned at the USPS facility immediately within their EMT account.

Utilizing USPS as an in-person method of ID verification has increased equity allowing claimants access to over 500 participating USPS locations throughout the state to verify their identity. This in-person option has provided greater access to claimants in several demographics including those in lower

income areas, those for whom English is not their first language and those who are not “tech savvy” or do not “trust” technology. However, claimants who live too far from a USPS facility or cannot make it to one for any other reason are provided the option to upload documents for staff review directly to their account, or to come into MADUA’s walk-in center to provide their IDs in person, which are then scanned and evaluated by staff trained in reviewing documents for ID verification.

Our ability to properly investigate potential fraudulent payments issued is a barrier due to laws which prevent MADUA from stopping payments when a potential improper payment is detected. An additional barrier is our ability to pay benefits timely associated with identity verification. It is extremely difficult to both properly verify a claimant identity and pay benefit timely to an approved claimant. Currently, MADUA does not send fact finding the main separation or other eligibility issues on a claim until the determination has been issued regarding identity. While this prevents unnecessary work on issues for which the IDV is later denied, this means these other non-monetary issues are sometimes not being sent for 7 or more days, while the fact finding allows another 10 days for response. This restraint makes it difficult to pay within 21 days.

Currently, MADUA does not use facial recognition associated with its ID verification process.

- Identify potential barriers that are created by fraud prevention and detection functions for legitimate claimants. Provide plans and actions designed to mitigate such risks.
 - As required in Section 4.b.i. of UIPL No. [11-23](#), states must ensure there is at least one timely, effective, and accessible non-digital alternative to online ID verification, which should not be overly burdensome on applicants, limit access to public benefits programs or the timely receipt of benefits, or stigmatize members of the public in any way. Provide details on the state’s non-digital ID verification option(s).
 - Include how the state flags cases for suspected fraudulent activity and how investigation resources are assigned, including:
 - What risk scoring elements and/or prioritization elements are used.
 - How the risk scoring elements and/or prioritization elements are weighted.
 - How the state evaluates the weights based on false positives and negatives.
 - How risk scoring elements and/or prioritization elements are updated.
 - How the state ensures the fraud risk scoring and/or prioritization of cases does not negatively affect legitimate claimants.
 - Include details on how the state measures claimants’ usage of both digital and non-digital identity verification options, how the state reviews digital services for false positive and false negatives, and how the state ensures legitimate claimants have alternative paths to prove their identity and/or resolve issues, including providing a possible recourse.
- **(Topic #7) – State plans and actions to mitigate negative consequences for victims of UI ID fraud, including ensuring simplified processes to remove the victim’s liability for overpayments resulting from ID fraud.**

MADUA’s EMT system was launched in May 2025. Several processes were built into the modernization plan to easily and quickly mitigate any negative consequences for victims of ID Fraud.

Chiefly, functionality for a fraud victim to be able to self-report fraud was added as a non-logged in function to the homepage of the new system, making it easy to find and submit. Once a fraud report has been submitted and processed, the new modernized system immediately disassociates the claim from the SSN of the fraud victim, along with stopping Collections activity of any kind on any overpayment associated with the account and classifying the debt as uncollectable.

Additionally, the system will automatically issue 1099G corrections for any years associated with the ID fraud where that form was issued, with staff intervention only required to verify the address the corrected 1099G should be sent. This allows for quick correction of any negative tax implication that may have occurred in conjunction with the ID fraud. Through each of these processes, MADUA has ensured fraud victims will not be charged or experience other negative consequences as a result of the ID fraud.

- Include details regarding how the state provides a reporting mechanism for UI ID fraud on their websites, communicates status updates for such investigations, and takes action to protect the victim when the state determines that UI ID fraud has occurred (*see* Section 4.b.v. of UIPL No. [11-23](#) for more details on protecting victims of ID fraud).
- Include the state's procedures for mitigating negative impacts on the UI ID fraud victim (*e.g.*, establishing a pseudo claim record, temporarily marking the overpayment as "uncollectible", etc.).
- **(Topic #8) – If the state has not provided complete and accurate overpayment reporting on the ETA 227 series of reports (Overpayment Detection and Recovery Activities), and the ETA 902P report (Pandemic Unemployment Assistance Activities), the state must provide information on plans for improvement, including timeframes and milestones, for addressing the issue and ensuring complete, accurate, and timely reporting in FY 2026.**

MADUA has not yet submitted a 227 report for Q2 2025. After our system modernization, some questions arose about the potential for some converted data to be missing. Specifically, a review was required to ensure overpayment data was being properly reflected on the report.

This issue is being diligently reviewed and we expect it to be resolved in the near future. Once that is done, the completion of the 227 report for Q2 2025 will be submitted. And the report for Q3 2025 will follow shortly afterward once we have reviewed and confirmed the data for that report. We expect both reports to be submitted at some point during Q4 2025 and do not expect any delays in submitting future reports.

- If the state has submitted all data for the ETA 227 series or 902P reports, this section is not applicable, and the state can input "N/A".

**U.S. Department of Labor
SQSP SIGNATURE PAGE**

OMB Control No.: 1205-0132

Expiration Date: 06/30/2027

U.S. DEPARTMENT OF LABOR Employment and Training Administration	FEDERAL FISCAL YEAR 2026	STATE Massachusetts
UNEMPLOYMENT INSURANCE STATE QUALITY SERVICE PLAN SIGNATURE PAGE		
This Unemployment Insurance State Quality Service Plan (SQSP) is entered into between the Department of Labor, Employment and Training Administration, and <u>Massachusetts Department of Unemployment Assistance</u> (NAME OF STATE AGENCY) The Unemployment Insurance SQSP is part of the State's overall operating plan, and, during this Federal fiscal year, the State agency will adhere to and carry out the standards set forth in Federal UI Law as interpreted by the DOL and adhere to the Federal requirements related to the use of granted funds. All work performed under this agreement will be in accordance with the assurances and descriptions of activities as identified in the SQSP Handbook and will be subject to its terms.		
TYPED NAME AND TITLE	SIGNATURE	DATE
Katie Dishnica _____ STATE ADMINISTRATOR (print name)		10/31/2025
Danielle Worthen-Ramos Acting Regional Administrator ETA Region 1 _____ DOL – REGIONAL OFFICE APPROVING OFFICIAL (print name)		1/9/2026
_____ DOL – NATIONAL OFFICE APPROVING OFFICIAL (print name) (if required)		

STATE PLAN NARRATIVE OUTLINE

STATE PLAN NARRATIVE Addendum to FY 2025 Biennial SQSP (Massachusetts – Fiscal Year 2026)

A. Overview

Our values, philosophy, and vision are captured in our Mission Statement:

Our job is to get it right the first time, and to do so timely, while:

- *Delivering friendly and professional service to all our customers;*
- *Protecting the UI Trust Fund, and combating fraud in all forms;*
- *Reliably assisting claimants with temporary income replacement and re-employment efforts;*
- *Helping businesses grow and prosper in Massachusetts; and*
- *Equipping our team with tools and training to empower our staff and challenge them to be the best*

As mentioned in previous State Quality Service Plan (SQSP) narratives, the Massachusetts Department of Unemployment Assistance (MDUA) bonded to replace our UI Online web based, self-service tax and benefits system. The mission of our Employment Modernization & Transformation (EMT) Project is to achieve the following:

- Provide outstanding service to the workforce and businesses of MA. Provide an improved customer experience, that is accessible to all, is compliant with the law, and available online, by phone, and in person. Deliver timely and accurate benefits and use the taxpayers' money efficiently.
- Be a national leader. Be among top performing states on federal performance measures focusing on timely and high-quality services and ensuring accessibility and equity in providing services to the workforce.
- Operate efficiently and ensure program integrity. Ensure that benefits are being disbursed to valid and legitimate unemployment claims and eliminate ineffective or unnecessary business processes to better provide streamlined service to customers.
- Provide accurate, timely and responsive reporting. Ensure that data is accurate and is provided timely and can flexibly respond to stakeholder needs and inquiries.

We implemented the Revenue portion of the new system on September 12, 2023 and Benefits portion on May 6, 2025. Following the successful completion of a major modernization effort, the agency has entered a stabilization period where the focus remains on service delivery and operational excellence. Even with increased demand on our services, achieving strong service levels continues to be a top priority.

National Priorities

The Department suggests a state plan focusing on strategies to:

- 1) Improve Program Performance and Operate the UI Program Effectively (see Attachment I);
- 2) Proactively Identify and Prevent Improper Payments and Fraud (see Attachment II);
- 3) Strengthening Reemployment Services (see Attachment III); and 3
- 4) Ensure Accurate and Complete Submission of ETA UI Required Reports (see Attachment IV).

1) Improve Program Performance and Operate the UI Program Effectively

Like other states, Massachusetts has not received adequate funding for its operations despite new challenges like increased UI fraud activity. DUA staff have an increased workload: combatting fraud and supporting victims of fraud; new claimant activity; EMT testing, training and launch; 1099 corrections; tax intercept. Due to lack of adequate funding, DUA must constantly shift resources to problem areas which opens more challenges to underserved areas.

The increased work and decrease in funding/staffing has had a direct impact on our ability to rebuild and improve program performance. Even with this increased demand on the agency, customer service and program performance remain a top priority for DUA. To strengthen support for claimants and ensure efficient operations, the agency has advanced several initiatives:

- Call Center Enhancements:
 - o In the general call center, a repeat caller feature has been introduced to improve efficiency and claimant experience.
 - o Outreach efforts now include connecting claimants scheduled for reemployment center in-person appointments with the option to resolve issues by phone, reducing unnecessary burdens on the claimant to travel for in-person service.
 - o The Program Integrity Call Center has transitioned to an industry-leading platform to improve service and security.
- Program Integrity Support and Resource Alignment:
 - o All available call center agents were temporarily reassigned to bolster the program integrity team, ensuring claimant issues are addressed by specialized staff rather than the general call center.
 - o A new direct-connect process now routes claimants with program integrity issues directly to trained staff for faster resolution.
- Messaging
 - o For calls that cannot reach the queue, changed operator message
 - o Updating mass.gov/dua to feature FAQs – a feature many other states have

yet MA does not

- o Adding a video short to complement FAQs and support wayfinding online to reduce call volume for questions that are answered online
- Identity Verification Modernization:
 - o In partnership with USDOL and the U.S. Postal Service, claimants can securely verify their identity in person at local USPS locations while filing unemployment applications.
 - o The agency continues to leverage advanced data analytics to validate identities and strengthen program integrity.
 - o Ongoing monitoring of the identity verification process ensures both security and a streamlined claimant experience.
- Reimagining Hybrid Work
 - o To ensure that everyone receives the full depth of training necessary to perform at their best and meet DUA standards we required Contact Center, Program Integrity and some Hearings department staff hired on or after January 1, 2020, to report in person three days per week. By increasing in-person workdays, we aim to:
 - Enhance training and mentorship opportunities
 - Strengthen team collaboration and knowledge sharing
 - Improve quality control and service delivery
 - Increase accountability and performance support
 - o Acknowledging hybrid work has its challenges, we partnered with a local university to build an internal chatbot to be used as a resource for call agents and adjusters to find answers to their questions quickly using source material like mass.gov/dua, UIPP policies, and the adjudication handbook.
- Adjudication
 - o In response to the current backlog and to improve our overall workflow and service delivery, we implemented a 3-month pilot program, starting on Friday, August 1. As part of this pilot, inbound contact center phone lines are closed on Fridays. During this time, our team focuses exclusively on processing claims, completing outbound calls, adjudication, and other administrative UI work.
 - o The goal is to redirect staff capacity toward resolving the growing backlog of issues which in turn is expected to reduce the volume of incoming calls over time. I believe this targeted initiative will create additional capacity and allow us to make significant progress on pending claims and deliver more timely service to our constituents.
 - o Recently DUA implemented modernized technology. Internal staff and external stakeholders (i.e. claimants) are navigating the learning curve associated with adopting new systems, workflows, and expectations. Invalid

Recording of Issue Detection Date appear to be an area that needs additional training. The agency plans to incorporate this into training by March 2026.

- To date we have seen an actionable issue backlog decrease of **49.22%**

- No. of issues resolved by staff: **108,083**
- Converted issues at start: **~18,000**
- Converted issues now: **129**
- Avg. daily completion rate is up **15%** from the start of the pilot

Together, these initiatives reflect the agency's ongoing commitment to delivering reliable, accessible, and secure services while continuing to adapt to claimant needs during this stabilization phase.

2) Proactively Identify and Prevent Improper Payments and Fraud

Massachusetts has completed extensive work to reduce its improper payment rate and continues to focus significant efforts on preventing and minimizing overpayments. The Commonwealth has invested substantial resources in detecting issues prior to payment, preventing many overpayments from occurring altogether. In addition, the agency conducts ongoing reviews to detect overpayments as early as possible, reducing the total amount of improper funds disbursed.

Identity fraud remains a major national challenge, driven by both individuals and organized criminal groups that contribute to a high volume of overpayments across the country. Massachusetts is a leader in combatting this issue. The state employs a progressive and multi-layered identity verification strategy throughout the life of a claim, including Social Security Administration (SSA) validation, private identity verification tools, and government-based ID proofing. Massachusetts continues to lead collaborative efforts to strengthen defenses against identity theft.

Work search compliance remains one of the top two causes of overpayments in Massachusetts. The Commonwealth's laws and interpretations clearly define claimant responsibilities, requiring at least three work search activities each week. The agency continues to refine operations and communications to reduce errors and help claimants comply with these requirements. While work search and unreported earnings—Massachusetts' primary causes of overpaid dollars—are largely dependent on claimant behavior, the agency is proactive in using targeted messaging and education to influence compliance. Messaging is incorporated throughout the claims process and on the agency's website to clearly communicate requirements and support claimants in meeting them.

Massachusetts continuously analyzes overpayment data to guide resource allocation and focus efforts where they will have the greatest impact. This data-driven approach has contributed to a steady reduction in the improper payment rate over time. New data shows continued improvement, reflecting the agency's commitment to accountability.

As part of the modernization effort, we revisited our business processes to ensure new technology supports the ongoing reduction of improper payments. In the new system, claimants must enter their work search activities before submitting continued claims, reinforcing compliance at the point of payment. As previously mentioned, the upgraded

system also incorporates a robust identity verification process that strengthens fraud prevention and enhances cybersecurity, enabling the agency to better detect and mitigate large-scale cyber threats.

Through these combined efforts—early detection, improved ID verification, claimant education, and system modernization—Massachusetts continues to make measurable progress in reducing improper payments and safeguarding program integrity.

3. Strengthening Reemployment Services

MDUA utilizes a wide array of work search activities to assist claimants with rapid reemployment. In our new online system, we enhanced the claimant's ability to accurately describe those activities in an effort to accelerate their reemployment opportunities as well as prevent improper payments.

MDUA also has a strong partnership with MassHire Career Centers (MHCC). DUA produces and works with MDCS to pull together all the data required for quarterly reporting together and for submittal.

The current RESEA selection model was developed by ETA Actuarial Services, in 2015 and was last updated in 2018. MDUA and MHCC, has engaged with Abt Associates, to continue the important work of evaluating the RESEA program in order to work with UI recipients most likely to exhaust benefits to facilitate the reemployment of those who may have barriers.

DUA continues to dedicate a team of people whose full-time job is to work on the programs where UI and employment services integrate. MHCC staff receive specific tiered training based on their role while representatives from the Department of Unemployment Assistance (DUA) are regionally assigned to MassHire Career Centers one day per week. There are dedicated team members for programs like RESEA, and a phone line and problem resolution email for MassHire staff to reach DUA.

DUA's Policy and Performance department facilitates a UI Chat program where pertinent information, and any policy or procedure changes are covered. These chats also provide an opportunity for MHCC staff to ask UI related information directly from a DUA subject matter expert. Training regarding RESEA is conducted quarterly and ad hoc, if needed (e.g. new operator/service provider).

4) Ensure Accurate and Complete Submission of ETA UI Required Reports

We expect the launch of the integrated EMT system to help facilitate more accurate reporting and accountability. As previously mentioned, we are in a stabilization period following the May 2025 implementation. During this period, I expect to identify and address any anomalies or inconsistencies that may arise when converted legacy data is reconciled with new data in the modernized system. This stabilization may require collaboration with USDOL to ensure that any

adjustments or revisions to previously reported ETA data are properly communicated and accounted for.

B. Federal emphasis (GPRA goals)

1. State performance compared to the GPRA goals.

Percent of Employer Tax Liability Determinations Made Timely (Establish Tax Accounts Promptly)

Target: 90 percent of status determinations for new employers will be made within 90 days of the end of the first quarter in which liability occurred.

New Employer Status Determination Time Lapse			
12/31/2024	3/31/2025	6/30/2025	9/30/2025
61.3%	58.8%	54.9%	65.4%

MA DUA did not meet this goal in FY 25. Our performance in this measure has decreased due to the multi-year modernization effort that began in FY 22. The tax functions of the new system went live in September 2023 which included implementation of new business rules as protective measures against employer fraud and fictitious employers. Following the first roll out, we focused on stabilizing operations and continued improvements on the UI system. The modernization of the benefit system also began soon after and went live in May 2025.

DUA has taken action to increase this performance measure. A new self-service option for not-subject employers to request redetermination of their liability was developed and implemented in production in February 2025. With this new functionality, employers can request a redetermination of their liability when they have met the liability thresholds. Prior to this update, employers had to call and email information to MA DUA to request a redetermination. This update has helped streamline this function for employers and staff. In February 2025, we also implemented new functionality to streamline and support redetermination of employer liability in cases where the employer has multiple periods of subjectivity and new functionality to support processing of certain business transfer cases. We have also shifted some of this work to a new team, Tax Integrity, which is fully staffed as of March 2025. This team is responsible for reviewing retroactive employer registrations to ensure timely review upon receipt of the registration along with other fraud prevention functions. Due to these efforts, our measure has slowly started recovering, increasing from 54.9% to 65.4% as of September 2025.

Detection of Recoverable Overpayments

Target: Overpayments established at a rate that is at least 57.5 percent of the estimated detectable, recoverable overpayments

Detection of Recoverable Overpayments			
12/31/2024	3/31/2025	6/30/2025	9/30/2025
52.80%	52.10%	46.54*0%	unknown

Please note that the 2nd quarter 2025 percentage is estimated by DOL and the 3rd quarter data is unavailable. This is because MADUA has not yet submitted the Q2 2025 227 report, while we work out some data corrections after the rollout of our new modernized benefits system. But while that data is to be determined, MA DUA did not meet this goal in FY 25. Our inability to meet this metric was largely due to the high volume of fraudulent claim activity MA DUA was experiencing, which required reallocating resources to deal with high call volumes and issue backlog associated with ID Theft and hacked accounts. Additional controls were added to deal with these problems, but staff were still digging out of a backlog of issues and correcting processes that became entangled with fraudulent accounts, namely fraud victims receiving a 1099G for benefits they did not receive and potentially a tax intercept for overpaid funds that actually went to a fraudster. So while these additional controls worked to mitigate the problems at the source, there was still additional work that required staff to be pulled away from detecting and establishing recoverable overpayments.

With the rollout of our modernized UI benefits system in May 2025, we implemented additional controls and new business rules to further mitigate these problems with ID Theft, which will increase the number of staff who can focus on overpayment detection. But with the launch of a new system, MA DUA has experienced a natural period of staff, claimants and employers requiring time to get accustomed to the new system. This has necessitated additional time spent on training, addressing basic navigational questions, and identifying and developing improvements to the new system. As staff get more comfortable with the new system and are able to spend more time on overpayment detection and establishment, this metric should improve along with them.

2. Actions planned to achieve GPRA goals and targets.

Percent of Employer Tax Liability Determinations Made Timely (Establish Tax Accounts Promptly)

Target: 90 percent of status determinations for new employers will be made within 90 days of the end of the first quarter in which liability occurred.

We plan to take a multifaceted approach to improve our measure and meet the GRPA goal. We are reviewing productivity and operational efficiency; Managers and supervisors are now utilizing the new system and built-in monitoring tools to perform quality control and better understand how team members are utilizing their time to identify opportunities to improve efficiency and productivity or training opportunities. We are also exploring future system enhancements to processes related to the detection of fictitious accounts and automated determinations of liability including 1) the development of cross-matching interface with MA DOR to support cross-validation of FEINS at registration, 2) development of a new extract for the new NASWA EDM functionality, 3) development of a new letter that will be issued automatically by the system when a not subject account files UI wages reminding them of the liability requirements and their responsibility to request a redetermination, and 4) automation of status determinations for certain scenarios based on employer wage filings.

Detection of Recoverable Overpayments

Target: Overpayments established at a rate that is at least 57.5 percent of the estimated detectable, recoverable overpayments

Multiple steps have already been taken to address this problem in our new UI benefits system. Increased communication to claimants about the requirements surrounding worksearch and reporting benefit year wages, along with claimants now being required to report their worksearch activities on their weekly certification are expected to help in this area. Additionally, improvements in our ID Verification process require less staff intervention in those areas which gave us a lot of trouble in the past, allowing more staff to focus on detecting and establishing overpayments. We expect to increase auditing issues worked by staff, to increase the quality of their casework, resulting in additional overpayment detection and will continue staff training to improve in this area as well. Additionally, we will continue working with our developer in improving issue detection and adjudication, to be able to find and establish overpayments more quickly as we collect more data to use in developing system enhancements.

Make Timely Benefit Payments

Target: 87.0 percent of intrastate first payments for full weeks of UC will be made within 14/21 days from the week ending date of the first compensable week.

This is a fundamental tenet of UI, and making payment when due remains our primary goal, and the need to make timely payments has been particularly challenging as we recently transitioned to a new UI system. This system change represented a major modernization effort, and while it brings many long-term benefits, the transition period has naturally impacted processing times as staff continue to become familiar with the new system and workflows.

In our contact center environment, where most of our non-monetary issue resolution work is being performed, we have enhanced training and support for staff, including additional refresher sessions and targeted guidance focused on navigating the new system efficiently. These efforts are helping staff build confidence and consistency in issue resolution, fact-finding, and determination processing.

The new UI system offers improved reporting and data visibility, allowing us to better monitor workloads, track timeliness, and identify bottlenecks early. This enhanced oversight enables managers to make more informed decisions about workload distribution and prioritize cases that may delay payment.

We also launched a pilot program to close the contact center phone lines on Fridays, allowing staff to focus exclusively on issue resolution and backlog reduction. This change has already produced positive results, with noticeable improvements in productivity and processing timeliness. Given this early success, we plan to continue the pilot in the coming months.

While we focus on timeliness, we remain committed to preserving our improvements in quality. Any sustainable process to ensure timeliness must also ensure quality standards are met. Ideally, there must be a balance. To accomplish this goal moving forward, we have enhanced adjudication training and implemented a mentorship program to provide staff with additional guidance and hands-on support. These initiatives help strengthen core adjudication skills, promote consistency, and build confidence in navigating the new system.

Additionally, we have put in place frequent informal one-on-one and small group training sessions.

The BTQ process will continue to be used as a tool for adjudication quality improvement and improved communication around that program is a must. This approach was coordinated by Call Center leadership and UI Performs staff. Not only did we see an improvement in timely payments, but also the quality of the cases increased. During FY 2025 we will continue with this strategy and continue to monitor its effectiveness.

Conducting business process analysis in key areas, reviewing and improving staff training, and working with outside resources have become a daily practice for us. We will continue with these efforts in the upcoming year as we continue to

prioritize the timely and accurate payment of benefits to eligible claimants.

C. Program Review Deficiencies

Massachusetts has used multiple approaches to rectify the UI Performs program deficiencies. Analysis of causes of failure to meet required core measures has been performed. We have worked with ETA and a vendor in development of tools to improve performance with the goal of meeting required performance standards.

D. Program Deficiencies

N/A

E. Reporting Deficiencies

We acknowledge reporting deficiencies and are making a significant investment in correcting this as we stabilize after the launch of our modernized system.

Reports have been reworked in the modernized system with an approach that allows fast access to data necessary to analyze anomalies or errors. We continue to work with ETA to establish report submission information for the reports that cannot be read by federal SUN server as well as testing of the new UIRS cloud system for report submission.

F. Customer Service Surveys (optional)

N/A

G. Other (e.g., approach to maintaining solvency, requests for technical assistance)

Massachusetts leadership have worked with business, labor, and legislators as part of a comprehensive review of the UI Trust Fund. Understanding the urgency, and with the goal of reaching long-term stability while also supporting employers and

impacted workers, the administration is convening those stakeholders into a working group to identify possible solution to maintaining solvency.

H. Assurances:

- a. Assurance of Equal Opportunity (EO).
- b. Assurance of Administrative Requirements and Allowable Cost Standards.
- c. Assurance of Management Systems, Reporting, and Recordkeeping.
- d. Assurance of Program Quality.
- e. Assurance on Use of Unobligated Funds.
- f. Assurance of Prohibition of Lobbying Costs (29 CFR Part 93).
- g. Drug-Free Workplace (29 CFR Part 98).
- h. Assurance of Contingency Planning.

Provide the most recent dates for the following:

- Information Technology (IT) Contingency Plan Implemented: 10/30/2024
- IT Contingency Plan Reviewed/Updated¹: 10/30/2024
- IT Contingency Plan Tested²: _____

- i. Assurance of Conformity and Compliance.
- j. Assurance of Automated Information Systems Security.

Provide the most recent dates for the following:

- Risk Assessment Conducted³: 02/05/2025
- System Security Plan Reviewed/Updated⁴: 04/22/2025

- k. Assurance of Confidentiality
- l. Assurance of Disaster Unemployment Assistance

- Conducted Annual DUA Training for DUA Staff ☒ Yes ☐ No

Provide the date of the training: 7/25/2025 through 8/27/2025

- Developed and/or Maintained a Standard Operating Procedures for use during a major disaster declaration ☐ Yes ☒ No (We are in the process of developing a standard operating procedure to use during a disaster declaration. We expect to have this completed by mid November 2025)

1 At a minimum, an IT Contingency Plan must be reviewed and/or updated annually.

2 At a minimum, an IT Contingency Plan must be tested annually.

3 At a minimum, a Risk Assessment should be conducted once every three (3) years.

4 At a minimum, a System Security Plan must be reviewed and/or updated annually.

Application for Federal Assistance SF-424

*** 1. Type of Submission:**

- ☐ Preapplication
☒ Application
☐ Changed/Corrected Application

*** 2. Type of Application:**

- ☒ New
☐ Continuation
☐ Revision

*** If Revision, select appropriate letter(s):**

*** Other (Specify):**

*** 3. Date Received:**

09/09/2025

4. Applicant Identifier:

5a. Federal Entity Identifier:

5b. Federal Award Identifier:

State Use Only:

6. Date Received by State:

08/21/2025

7. State Application Identifier:

MA

8. APPLICANT INFORMATION:

*** a. Legal Name:**

MA Executive of Labor and Work

*** b. Employer/Taxpayer Identification Number (EIN/TIN):**

04-6002284

*** c. UEI:**

EMBXRXJNMHW3

d. Address:

*** Street1:**

19 Staniford Street

Street2:

*** City:**

Boston

County/Parish:

Suffolk

*** State:**

MA: Massachusetts

Province:

*** Country:**

USA: UNITED STATES

*** Zip / Postal Code:**

02114-4121

e. Organizational Unit:

Department Name:

DUA

Division Name:

f. Name and contact information of person to be contacted on matters involving this application:

Prefix:

*** First Name:**

Mark

Middle Name:

*** Last Name:**

Costello

Suffix:

Title:

Chief of Staff

Organizational Affiliation:

*** Telephone Number:**

617-626-6841

Fax Number:

*** Email:**

mark.costello@mass.gov

Application for Federal Assistance SF-424

* 9. Type of Applicant 1: Select Applicant Type:

A: State Government

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

* Other (specify):

* 10. Name of Federal Agency:

Employment and Training Administration

11. Assistance Listing Number:

17.225

Assistance Listing Title:

Unemployment Insurance

* 12. Funding Opportunity Number:

ETA-UIPL-15-25-BASE

* Title:

Fiscal Year (FY) 2026 State Workforce Agency Unemployment Insurance (UI) Resource Planning Targets and Guidelines

13. Competition Identification Number:

ETA-UIPL-15-25-BASE

Title:

Fiscal Year (FY) 2026 State Workforce Agency Unemployment Insurance (UI) Resource Planning Targets and Guidelines

14. Areas Affected by Project (Cities, Counties, States, etc.):

1234-Assurances for Non-Construction Progra

Add Attachment

Delete Attachment

View Attachment

* 15. Descriptive Title of Applicant's Project:

FY 2026 Base Allocations

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

Application for Federal Assistance SF-424**16. Congressional Districts Of:*** a. Applicant * b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

17. Proposed Project:* a. Start Date: * b. End Date: **18. Estimated Funding (\$):**

* a. Federal	56,847,964.00
* b. Applicant	0.00
* c. State	0.00
* d. Local	0.00
* e. Other	0.00
* f. Program Income	0.00
* g. TOTAL	56,847,964.00

*** 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

- ☐ a. This application was made available to the State under the Executive Order 12372 Process for review on .
- ☐ b. Program is subject to E.O. 12372 but has not been selected by the State for review.
- ☒ c. Program is not covered by E.O. 12372.

*** 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**☐ Yes ☒ No

If "Yes", provide explanation and attach

21. *By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)**

☒ ** I AGREE

** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix: * First Name:

Middle Name:

* Last Name:

Suffix:

* Title: * Telephone Number: Fax Number: * Email: * Signature of Authorized Representative: * Date Signed:

ASSURANCES - NON-CONSTRUCTION PROGRAMS

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington, DC 20503.

PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.

NOTE: Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

1. Has the legal authority to apply for Federal assistance and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States and, if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee- 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and, (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.
7. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally-assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
8. Will comply, as applicable, with provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

9. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§327-333), regarding labor standards for federally-assisted construction subagreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93-205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §§469a-1 et seq.).
14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. §§2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§4801 et seq.) which prohibits the use of lead-based paint in construction or rehabilitation of residence structures.
17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations, and policies governing this program.
19. Will comply with the requirements of Section 106(g) of the Trafficking Victims Protection Act (TVPA) of 2000, as amended (22 U.S.C. 7104) which prohibits grant award recipients or a sub-recipient from (1) Engaging in severe forms of trafficking in persons during the period of time that the award is in effect (2) Procuring a commercial sex act during the period of time that the award is in effect or (3) Using forced labor in the performance of the award or subawards under the award.

SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL Mark Costello	TITLE Chief of Staff
APPLICANT ORGANIZATION Massachusetts Department of Unemployment Assistance	DATE SUBMITTED 09/09/2025

Standard Form 424B (Rev. 7-97) Back

State Quality Service Plan (SQSP) Corrective Action Plan (CAP) Excel Workbook Reporting Format Instructions

1. This Excel workbook will be used by states to develop their SQSP CAPs and to report updates to milestones and performance each quarter. The intent is to capture the state's SQSP performance improvement activities in a single document.
2. The "**Biennial SQSP Overview**" worksheet and the "**Alternate Year Overview**" worksheet provides an overview of the state's performance for the associated SQSP year.
 - **Column "B"** - Lists performance measures and programs areas by name.
 - **Column "C"** - Identifies the Acceptable Level of Performance (ALP) for each measure.
 - **Columns "D" & "E"** - Indicates if the CAP is a new (N) or existing (E) CAP.
 - **Column "G"** - Highlights performance results in "yellow" if a CAP is required. A corresponding CAP worksheet (tab) is included in the Workbook for developing the CAP and providing quarterly updates.
 - **Integrity Action Plan (IAP) Top Three Root Causes** for improper payments: The top three root causes are identified in rows 37-39 of the overview pages and are required to be addressed in each state's IAP. The IAP Word document template will be provided by the Regional Office.
 - **Monitoring Findings/Audit Resolution:** Regional Offices may include monitoring findings and/or audit resolutions that remain open/unresolved at the time of the SQSP submission and may request the state report the actions being taken to resolve the open/unresolved finding.
3. **CAP Worksheets:**

• Similar Performance Measures have been grouped together so that only one CAP/CAP Worksheet is required for these measures (i.e. First Payment Timeliness Measures, Lower Authority Appeals Promptness Measures).

• Each CAP Worksheet (tab) is divided into the following sections:

- o Performance Measures
- o Performance Data
- o Corrective Action Plan Summary
- o Milestones and Completion Dates

NOTE: The CAP Excel Workbook should be kept as a full Workbook. Removal of any CAP worksheets from the Workbook will break links and diminish functionality of the Workbook.

Performance Measures

Each measure and program area the state is expected to address is pre-filled in each worksheet.

Performance Data

- a) The *ALP* (or criteria) is the nationally set minimally acceptable performance level that states are expected to meet. The ALP for each performance measure and program area to be addressed is pre-filled on the Worksheet.
- b) The "*CAP Based on (Year of performance - specific to the measure) Performance*" is the performance level achieved at the end of the measurement/performance period for the specific measure/program. The performance level will be listed numerically or listed as Pass/Fail (i.e. Tax Quality, Data Validation, etc.). A majority of the core measures are based on 12 months of performance from April 1- March 31, while other measures may be based on the calendar year or the Payment Integrity Information Act (PIIA) year. The "measurement period" for each measure is listed in Handbook No. 336 and in an Attachment to the annual SQSP UIPL. This performance level is pre-filled by the ETA Regional Office.
- c) The "*Target Performance*" level is the 12-month cumulative performance level the state expects to achieve by each quarter ending date in line with the CAP and milestone activities. States should estimate the "target performance" level based on all the known factors at the time the CAP is submitted. The "target performance" level should be attainable based on the milestone achievements and should reflect incremental improvements from quarter to quarter. If the "target performance" level is changed during the SQSP period, the state should include an explanation as to why it was changed in the quarterly SQSP update.
- d) The "*Actual Performance*" level is the actual 12-month cumulative performance met as of the quarter ending date. For example, for the first quarterly report for quarter ending December 31, 2024, the "actual performance" level should be the cumulative performance achieved from January 1, 2024 - December 31, 2024. For the second quarterly report for quarter ending March 31, 2025, the "actual performance" level should be the cumulative performance achieved from April 1, 2024 - March 31, 2025. Most of the "actual performance" data is available at <https://oui.doeleta.gov/unempjob/DataDashboard.asp>.

If the "actual performance" level for a measure cannot be found, please contact your ETA Regional Office for assistance.

Corrective Action Plan Summary

The summary must address each of the following:

- a) the reason for the deficiency;
- b) a description of the specific actions/activities planned to improve performance;
- c) an explanation of why a previous plan was unsuccessful (if applicable);
- d) a plan for monitoring and assessing accomplishments of planned actions for each CAP; and
- e) remaining actions to be completed after the current CAP timeframe.

Enter an X in the "yellow" box on the CAP worksheet if the desired performance improvements will not be accomplished by the end of the two years for which the plan is in effect.

Note: The worksheet can be expanded to allow for additional space. ETA Regional Offices will provide technical assistance to states in developing the SQSP in the Excel format.

Milestones and Completion Dates

States must list specific milestones (key corrective action or improvement activities) and the completion date for each milestone in the space provided. Milestones must be established for each element of the state's CAP and be of sufficient number and frequency to oversee and assess their progress during the SQSP cycle. A completion date for each milestone should also be entered by selecting a date from the drop-down box.

Note: If a CAP worksheet is removed from the Excel workbook, the drop-down box functionality will not work as intended.

Quarterly Updates

States must provide a quarterly update for each milestone in the space provided. The update should describe if the milestone was completed as scheduled or explain if the milestone was not completed as scheduled. The state must submit a new target completion date if the milestone was not completed as scheduled.

Massachusetts						
MEASURES/PROGRAMS TO BE ADDRESSED FOR BIENNIAL SQSP FISCAL YEAR (FY) 2025						
Measures/Programs to be Addressed (Each Measure Below is Hyperlinked to the CAP Worksheet)		Acceptable Level of Performance (ALP)	Corrective Action Plan (CAP)		Narrative Required (In Word Doc.)	SQSP 2025 Performance Year Data
			N	E		
B E N E F I T S	First Payment Promptness	≥ 87%		X		71.32%
	First Payment Promptness (IntraState 14/21 Days)	≥ 87%		X		71.61%
	First Payment Promptness (InterState 14/21 Days)	≥ 70%				70.36%
	First Payment Promptness (IntraState 35 Days)	≥ 93%		X		87.96%
	First Payment Promptness (InterState 35 Days)	≥ 78%				87.02%
	Nonmonetary Determination Timeliness	≥ 80%		X		58.33%
	Nonmonetary Determination Quality - Separations	≥ 75%		X		59.68%
	Nonmonetary Determination Quality - Nonseps	≥ 75%		X		72.89%
A P P E A L S	Lower Authority Appeals (30 Days)	≥ 60%		X		49.12%
	Lower Authority Appeals (45 Days)	≥ 80%		X		67.86%
	Average Age of Pending Lower Authority Appeals	≤ 30 days				28.0
	Average Age of Pending Higher Authority Appeals	≤ 40 days		X		189.0
	Lower Authority Appeals Quality	≥ 80%				100.0%
	New Employer Status Determinations Timelapse	≥ 70%	X			68.9%
T A X	Tax Quality (Part A)	No more than 3 tax functions failing TPS in a year				Pass
	Tax Quality (Part B)	The same tax function cannot fail for 3 consecutive years		X		Fail: SD - Inactivations Credits/Refunds
	TPS Sample Reviews	Pass				Pass
	Effective Audit Measure	Pass 4 factors/score ≥ 7		X		Fail: Factor 1: 0.3% Factor 3: 0.5%
						24.38%
I N T E G R I T Y	Improper Payments Measure	< 10%		X		45.27%
	Detection of Overpayments - 3 Year Measure	≥ 50% & ≤ 95%	X			23.59%
	Overpayment Recovery Measure	≥ 68%		X		
	Data Validation - Benefits (All Submitted & Passing)	All Benefit Pops Submitted & Passing		X		Fail: Benefits 1, 3, 4, 5, 8-15
						Not Submit: Benefits 3a; BTQ 1-3; Module 3
	Data Validation - Tax (All Submitted & Passing)	All Tax Pops Submitted & Passing	X			Fail: Tax 3
B A M	NDNH BAM Compliance	Pass				Pass
	BAM Operations Compliant	Pass All M&P		X		Fail Case Completion: Paid = 86.42% Monetary = 88.96% Separation = 87.01% Non-Sep = 86.93%
						Fail 60-day timeliness Paid = 46.65% Non-Separation = 59.48%
G P R A						Fail 90-day timeliness Paid = 68.11% Denied (Monetary) = 78.57% Denied (Separation) =77.92% Denied (Non-Sep) = 77.78%
						Fail Comparison Report Denied (Monetary) = 280.19%
	Incorrect Recording of Issue Detection Date	95%				98.18%
	Incorrect Recording of Determination Date	95%				98.18%
	UI Reporting Requirements	Pass			X	Fail
	Percent of Intrastate Payments Made Timely	87%				71.61%
	Detection of Recoverable Overpayments	57.5%				49.07%
	Percent of Employer Tax Liability Determinations Made Timely	90%				65.60%
Integrity Action Plan (IAP) Top Three Root Causes						
1. Work Search; Percent of Dollars OP: 34.23%						
2. Benefit Year Earnings; Percent of Dollars OP: 28.085%						
3. Other Eligibility; Percent of Dollars OP: 12.907%						
Monitoring Findings/Audit Resolution						
BAM 60-Day DCA Timeliness Non-Separation CAP FY25		ALP Met				Batch 202314~202413: 72.48%
BAM 90-Day DCA Timeliness Monetary CAP FY25		ALP Met				Batch 202314~202413: 88.08%
BAM 90-Day DCA Timeliness Separation CAP FY25		ALP Met				Batch 202314~202413: 88.16%
BAM 90-Day DCA Timeliness Non-Separation CAP FY25		ALP Met				Batch 202314~202413: 87.25%

Massachusetts						
MEASURES/PROGRAMS TO BE ADDRESSED FOR ALTERNATE SQSP FISCAL YEAR (FY) 2026						
Measures/Programs to be Addressed (Each Measure Below is Hyperlinked to the CAP Worksheet)		Acceptable Level of Performance (ALP)	Corrective Action Plan (CAP)		Narrative Required (In Word Doc.)	SQSP 2026 Performance Year Data
			N	E		
B E N E F I T S	First Payment Promptness	≥ 87%		X		66.20%
	First Payment Promptness (IntraState 14/21 Days)	≥ 87%		X		66.3%
	First Payment Promptness (InterState 14/21 Days)	≥ 70%	X			65.4%
	First Payment Promptness (IntraState 35 Days)	≥ 93%		X		85.1%
	First Payment Promptness (InterState 35 Days)	≥ 78%				83.6%
	Nonmonetary Determination Timeliness	≥ 80%		X		54.00%
	Nonmonetary Determination Quality - Separations	≥ 75%		X		*53.80%
	Nonmonetary Determination Quality - Nonseps	≥ 75%				*81.20%
A P P E A L S	Lower Authority Appeals (30 Days)	≥ 60%				66.00%
	Lower Authority Appeals (45 Days)	≥ 80%				83.70%
	Average Age of Pending Lower Authority Appeals	≤ 30 days				16.0
	Average Age of Pending Higher Authority Appeals	≤ 40 days				21.0
	Lower Authority Appeals Quality	≥ 80%				100.00%
T A X	New Employer Status Determinations Timelapse	≥ 70%		X		58.80%
	Tax Quality (Part A)	No more than 3 tax functions failing TPS in a year				Pass
	Tax Quality (Part B)	The same tax function cannot fail for 3 consecutive years		X		Fail: SD - Inactivations Credits/Refunds
	TPS Sample Reviews	Pass				Pass
	Effective Audit Measure	Pass 4 factors/score ≥ 7		X		Fail: Factor 1: 0.3% Factor 3: 0.7% Factor 4: 0.7 Blended Score: 3.8
I N T E G R I T Y	Improper Payments Measure	< 10%		X		21.46%
	Detection of Overpayments - 3 Year Measure	≥ 50% & ≤ 95%		X		49.69%
	Overpayment Recovery Measure	≥ 68%		X		19.54%
	Data Validation - Benefits (All Submitted & Passing)	All Benefit Pops Submitted & Passing		X		Fail: Not Submit: Benefits 1, 3, 3a, 4, 8-15; BTQ 1-3
	Data Validation - Tax (All Submitted & Passing)	All Tax Pops Submitted & Passing		X		Fail: Module 5 (Wage Items)
B A M	NDNH BAM Compliance	Pass				Pass
	BAM Operations Compliant	Pass All M&P		X		Fail Case completion: Paid = 88.93% Denied (Monetary) = 91.22% Denied (Separation) = 90.00% Denied (Non-Separation) = 91.22% Fail Paid Timeliness: 60 day timeliness = 57.58% 90 day timeliness = 81.35% Fail Sample Selection: Denied (monetary) = 148 Denied (Non-Separation) = 148
	Incorrect Recording of Issue Detection Date	95%				X
	Incorrect Recording of Determination Date	95%				99.48%
	UI Reporting Requirements	Pass			X	Fail
G P R A	Percent of Intrastate Payments Made Timely	87%			X	66.30%
	Detection of Recoverable Overpayments	57.5%			X	26.94%
	Percent of Employer Tax Liability Determinations Made Timely	90%			X	58.81%
Integrity Action Plan (IAP) Top Three Root Causes - Payment Integrity Information Act (PIIA) Year Data						
1. Work Search; Percent of Dollars OP: 37.26%						
2. Benefit Year Earnings; Percent of Dollars OP: 24.15%						
3. Other Eligibility; Percent of Dollars OP: 15.52%						
Monitoring Findings/Audit Resolution						

* State did not submit all reports for the period and performance has been estimated based on the partial data submitted.
Except for the Overpayment Recovery Measure.

** means the following: The recovery rate is the ratio report overpayments recovered to overpayments established in the same time period. However the amounts recovered for any quarter may be from overpayments established in many previous time periods. In the past few years, states implementation of the Treasury Offset Program to recover overpayments through federal tax offset has resulted in high recovery of overpayments previously established. Due to this high recovery of overpayments established in previous quarters, recovery rate ratio may show result exceeding 100% for few states.

First Payment Promptness												
Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report					Back to Biennial Overview 2025				Back to Alternate Overview 2026			
State: Massachusetts					Federal Fiscal Year 2025				Federal Fiscal Year 2026			
Performance Measures	ALP	CAP Based on 04/01/2023 - 03/31/2024 Performance	CAP Based on 04/01/2024 - 03/31/2025 Performance	State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4
First Payment Promptness: % of all 1st payments within 14/21 days after the compensable week.	≥ 87%	71.32%	66.20%	Target	72.0%	74.0%	74.0%	75.0%	80.0%	82.0%	84.0%	87.0%
				Actual	68.8%	66.2%	64.3%	55.9%				
First Payment Promptness, 14/21 days Intrastate UI full weeks	≥ 87%	71.61%	66.30%	Target	72.0%	74.0%	74.0%	75.0%	80.0%	82.0%	84.0%	87.0%
				Actual	69.0%	66.3%	64.4%	55.9%				
First Payment Promptness, 14/21 days Interstate UI full weeks	≥ 70%	70.36%	65.40%	Target	N/A							
				Actual								
First Payment Promptness, 35 days Intrastate UI full weeks	≥ 93%	87.96%	85.10%	Target	88.0%	90.0%	90.0%	91.0%	92.0%	93.0%	93.0%	93.0%
				Actual	87.6%	85.1%	82.5%	72.8%				
Regional Office Comments in cell below:												
Reminder: The "Actual Performance" level is the actual 12-month cumulative performance met as of the quarter ending date. For example, for the first quarterly report for quarter ending December 31, 2024, the "actual performance" level should be the cumulative performance achieved from January 1, 2024 - December 31, 2024.												
Performance Measures were updated for the following sections: *First Payment Promptness: % of all 1st payments within 14/21 days after the compensable week: Q1:68.8%; Q2:66.2%; *First Payment Promptness, 14/21 days Intrastate UI full weeks: Q1: 69.0%; Q2: 66.3%; *First Payment Promptness, 35 days Intrastate UI full weeks: Q1:87.6%; Q2: 85.1%; Q3: 82.5%												
Corrective Action Plan Summary												
The Summary must provide: Alternate Year Plan Updates A. The Reason for the deficiency. The reason for failing to meet the First Payment Promptness metric continues to be our adjudication backlog of issues over twenty-one days, due to the implementation of Identity Verification (IDV) issues on every newly filed claim, which prevents our adjudicators from being able to work on any other pending issues created on the claim until after the IDV issue has been resolved. In addition, there continues to be a large number of fraud cases as well as a backlog of IDV issues, which causes a backlog of adjudication issues.												
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B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. We plan on training our Limited Duration (LD) Adjudication Staff on all issues as thus far they have only been trained on a select few. We intend to continue to manage and monitor our Adjudication Projects to contain the volume of our backlog. We will continue to prioritize working the issues that are revived on the claim after the IDV issue has been resolved. We will continue to collaborate with other Departments within the Agency to address the timeliness of IDV issue resolution. One of our adjudication projects is pulling the unidentified employer queues (EIRP and ENOC) and assigning to staff for correction. This helps to ensure initial claims are processed timely and any non-monetary issues on the claim move along the adjudication process in a timely manner. We also continue to utilize our data tools (Power BI) for both adjudication and claims to analyze the work being completed vs the work coming in and adjusting the way we do business according to these results.												
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NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved.												
(Enter Remaining Major Actions Here)												
Milestones												
1. Continue to monitor contact center workflow and make adjustments to business procedures to improve customer experience.											Completion Date 9/30/2026	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Effective 10/15/24 – our total staffing count for the Contact Center including management is 227. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Effective 1/28/25 – our total staffing count for the Contact Center including management is 221. We have a total of 61 LD JSRs, which 24 of them are assisting with Customer Assistance calls full-time and 2 of them are assisting the REC. Effective 4/8/25 – our total staffing count for the Contact Center including management is 222. All Contact Center staff are now permanent as all limited duration staff were made permanent status end of last quarter. DUA continues to work with FH Cann who is a vendor for phone staff coverage, with 140 representatives taking CC customer assistance calls on a full-time basis. Directors continue to work with FHC to provide support, we hold a weekly check-in with the vendor. We continue to utilize the Shared Inbox between DUA and vendor FHC as a support service to them. This is being implemented for a better customer experience and to allow claimants that require Contact Center Assistance a better opportunity to get into the queue to receive the needed assistance. PCILs continue to meet with each of their staff on a bi-weekly basis. FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Effective 4/8/25 – our total staffing count for the Contact Center including management is 222. All Contact Center staff are now permanent as all limited duration staff were made permanent status end of last quarter. DUA continues to work with FH Cann who is a vendor for phone staff coverage, with 140 representatives taking CC customer assistance calls on a full-time basis. Directors continue to work with FHC to provide support, we hold a weekly check-in with the vendor. We continue to utilize the Shared Inbox between DUA and vendor FHC as a support service to them. This is being implemented for a better customer experience and to allow claimants that require Contact Center Assistance a better opportunity to get into the queue to receive the needed assistance. PCILs continue to meet with each of their staff on a bi-weekly basis. FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): During this quarter our staff continue to acclimate to successfully navigate the new UI Online platform. DUA had around 17,000 converted issues, which transitioned from our old system and needed to be resolved in the new system. It was discovered by working on these issues that most of the fact finding/documentation was in our prior system. The resolution of these issues took an extensive amount of time as staff needed to go from system to system to ensure all required information was part of the case file as required by DOL. Because these issues were a priority and took an absorbent amount of time, this negatively impacted on our ability to effectively work on our timely first pay issues. We continue to work with our vendor, FH Cann to assist with answering calls from our constituents. We started Saturday Overtime in order to get through the converted issues in order to focus on our timely first pay issues. FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):												
2. Use Limited Duration staff to augment personnel resources.											Completion Date 9/30/2026	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): During this quarter, we continue to have an average of 63 Limited Duration Adjusters (JSRs), of which 27 out of the 63 worked on answering customer assistance calls full-time due to the volume of calls and the remaining 36 limited duration JSRs worked on Adjudication during the quarter. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): During this quarter, we continued to have an average of 63 Limited Duration Adjusters (JSRs), of which 27 out of the 63 worked on answering customer assistance calls full-time due to the volume of calls and the remaining 36 limited duration JSRs worked on Adjudication during the quarter. FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Effective 3/23/25, our remaining 64 Limited Duration JSRs were converted to permanent JSRs and our Acting JSRs were converted to permanent JSRs. The contact center now has all permanent staff, no further limited duration staff. On 3/28/25, CC staff that have a hire date of 3/28/25 or later are now permanent. Our former Limited Duration staff, who are now permanent, are continuing their Adjudication Training with a goal of working independently. Currently, they are each assigned a mentor to work under which extends the amount of time it takes to work/resolve issues due to the necessary review process. Once released to work issues independently, the amount of time it takes to resolve an issue will vastly decrease, which will in turn assist us with meeting timely first pay promptness. FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):												

FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):

FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):

FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):

3. Identify any non-adjudication roadblocks and create a plan to execute.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): We continue during this quarter to work with Program Integrity (PI) department to better streamline the high volume of calls and work for PI. During this quarter, we assist PI by having all calls routed to Contact Center first, to triage and determine which calls to transfer to their FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): The staff in the Reemployment Center continue to work our unidentified queues (EIRP and ENOC) to assist with ensuring our claims are processed timely when able to do so. We continue to assist Mashire staff with our Career Assist Queue Line to our agents for assistance, if they FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): The staff in the Reemployment Center continue to work our unidentified queues (EIRP and ENOC) to assist with ensuring our claims are processed timely when able to do so. We continue to assist Mashire staff with our Career Assist Queue Line to our agents for assistance, if they FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): The staff in the Reemployment Center and our Agents continue to work our unidentified queues (EIRP and ENOC) to assist with ensuring our claims are processed timely when able to do so. We continue to assist Mashire staff with our Career Assist Queue Line with our agents for assistance if they have one of our customers present and are unable to assist. Our contact center agents assisted with mentoring staff in a new unit called Program Integration Unit, which staff will work in specific MassHire locations to assist with our claimants. FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
4. Develop & Deliver new/refresher training to stay current with processes and procedures.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): We continue to plan on implementing a new system in May of 2025, which is EMT. This assists our staff in preparing and familiarizing themselves with the upcoming new system for better customer experience. One of our supervisors and two of our agents were temporarily FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): We continue to plan on implementing a new system in May of 2025, which is EMT. This assists our staff in preparing and familiarizing themselves with the upcoming new system for better customer experience. On 1/22/25, Yvonne, Heidi and all CC PCIIIs will attend a TEAMS FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): With our new UI administrative system going live on May 6th, we have been working diligently to implement a pre and post training program which will allow staff to complete tasks. FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): In August of this quarter, UIPP conducted Phase 1 training in-person, staff that attended were then assigned a mentor to work with. Contact Center Directors worked in conjunction with UIPP to develop a more comprehensive Phase 1 adjudication training, which increased from FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
5. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
6. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

7. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
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FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

Nonmonetary Determination Timeliness												
Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report					Back to Biennial Overview 2025				Back to Alternate Overview 2026			
State: Massachusetts					Federal Fiscal Year 2025				Federal Fiscal Year 2026			
Performance Measures	ALP	CAP Based on 04/01/2023 - 03/31/2024 Performance	CAP Based on 04/01/2024 - 03/31/2025 Performance	State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4
Nonmonetary Determination Timeliness	≥ 80%	58.33%	54.00%	Target	60.0%	62.0%	62.0%	65.0%	70.0%	73.0%	76.0%	80.0%
					Actual	54.5%	49.9%	50.7%	47.8%			
Regional Office Comments in cell below:												
Corrective Action Plan Summary												
The Summary must provide: Alternate Year Plan Updates A. The Reason for the deficiency. The reason for failing to meet the First Payment Promptness metric continues to be our adjudication backlog of issues over twenty-one days, due to the implementation of Identity Verification (IDV) issues on every newly filed claim, which prevents our adjudicators from being able to work on any other pending issues created on the claim until after the IDV issue has been resolved. In addition, there continues to be a large number of fraud cases as well as a backlog of IDV issues, which causes a backlog of adjudication issues.												
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Milestones												
1. Monitor, Improve & Develop adjudication processes and procedures.											Completion Date	
											9/30/2026	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Effective 10/15/24 – our total staffing count for the Contact Center including management is 227. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Effective 1/28/25 – our total staffing count for the Contact Center including management is 221. We have a total of 61 LD JSRs, which 24 of them are assisting with Customer Assistance calls full-time and 2 of them are assisting the REC. Effective 1/13/25, all adjusters had their FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Effective 4/8/25 – our total staffing count for the Contact Center including management is 222. All Contact Center staff are now permanent as all limited duration staff were made permanent status end of last quarter. DUA continues to work with FH Cann who is a vendor for phone FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): During this quarter our staff continue to acclimate to successfully navigate the new UI Online platform. DUA had around 17,000 converted issues, which transitioned from our old system and needed to be resolved in the new system. It was discovered by working on these issues FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):												
2. Use Limited Duration staff to augment personnel resources.											Completion Date	
											9/30/2026	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): During this quarter, we continue to have an average of 63 Limited Duration Adjusters (JSRs), of which 27 out of the 63 worked on answering customer assistance calls full-time due to the volume of calls and the remaining 36 limited duration JSRs worked on Adjudication during FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): During this quarter, we continued to have an average of 63 Limited Duration Adjusters (JSRs), of which 27 out of the 63 worked on answering customer assistance calls full-time due to the volume of calls and the remaining 36 limited duration JSRs worked on Adjudication during FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): During this quarter, we continued to have an average of 63 Limited Duration Adjusters (JSRs), of which 27 out of the 63 worked on answering customer assistance calls full-time due to the volume of calls and the remaining 36 limited duration JSRs worked on Adjudication during FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Our former Limited Duration staff, who are now permanent, are continuing their Adjudication Training with a goal of working independently. Currently, they are each assigned a mentor to work under which extends the amount of time it takes to work/resolve issues due to the FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):												

3. Use data collecting resources to monitor and forecast adjudication impediments and successes. Continue to monitor and reduce the aging of issues in our backlog.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): We continue to send DUA non-monetary tracking issues on a weekly basis, which is used to pick up on any trends or increase/decrease in our adjudication queues. We continue to update any spreadsheets being worked on for adjudication projects to monitor the progress and FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): We continue to send DUA non-monetary tracking issues on a weekly basis, which is used to pick up on any trends or increase/decrease in our adjudication queues. We continue to update any spreadsheets being worked on for adjudication projects to monitor the progress and FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): We continue to send DUA non-monetary tracking issues on a weekly basis, which is used to pick up on any trends or increase/decrease in our adjudication queues. We continue to update any spreadsheets being worked on for adjudication projects to monitor the progress and success of it, some examples are issues over a year (pulling 10 months or older on a weekly basis), Reasonable Assurance issues, late appeal issues, predate issues, dependency multiple issues, and all issues revived from a denied IDV that is now redetermined as eligible. We continue to update and work on these Adjudication projects on a weekly basis. We implemented a report into our weekly meeting with PI showing what the top 5 highest queues were during prior week. This way we can identify any impediments and discuss any changes needed. Management utilizes an online app that tracks adjudication productivity to assess the progress of their team. This allows them to identify individuals who would benefit from coaching as well as identifying individuals who could be considered for adjudication backlog projects. Yvonne and Heidi met to discuss Adjudication Productivity levels to ensure staff are effective in performing their work. We decided on 1 Daily JSR Productivity Report that is currently being utilized determine to add a section for JSRs to include the number of hours of adjudication each day (less training/meetings/etc.) to determine actual productivity. All Adjudication Teams will utilize the same daily report for uniformity. Yvonne and Heidi are restructuring the Adjudication Projects to assign each Team to two projects each to focus on. Currently, the PCIII's Teams are assigned to 4 to 6 projects some of which they share responsibility with other Teams. Yvonne and Heidi are developing a Contact Center Adjudication Projects Weekly Report to track the progress of the projects to coincide with the restructuring of the Adjudication Project assignments. The Teams will begin using this daily log on Monday, March 3, 2025. Adjuster daily log we decided on. The PCIIIs will report out on the status/progress of their Adjudication Projects each week during the Adjudication PCIII meeting held on Tuesday afternoon. Weekly Adjudication Team Productivity Report. Since implementing our new UI administrative system, mamangers continue to learn about new reporting tools. FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): We continue to utilize our contact center adjudication weekly report to track the progress of work performed and quantity of work for each staff member. The PCIIIs will report out on the status/progress of their staff each week. During this quarter, we began to familiarize FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
4. Develop & Deliver new/refresher adjudication training.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): We continue to plan on implementing a new system in May of 2025, which is EMT. This assists our staff in preparing and familiarizing themselves with the upcoming new system for better customer experience. One of our supervisors and two of our agents were temporarily FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): We continue to plan on implementing a new system in May of 2025, which is EMT. This assists our staff in preparing and familiarizing themselves with the upcoming new system for better customer experience. On 1/22/25, Yvonne, Heidi and all CC PCIIIs will attend a TEAMS FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): With the implementation of our new UI adminitrative system we have focused most of our training has encompassed navigating the new system. Once the new system was implemented on May 6th, training coordinators started the task of updating curriculum to train and reflash claims agants and adjudicators. FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
5. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
6. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

7. (Enter next milestone here)		Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		

Nonmonetary Determination Quality												
Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report					Back to Biennial Overview 2025				Back to Alternate Overview 2026			
State: Massachusetts					Federal Fiscal Year 2025				Federal Fiscal Year 2026			
Performance Measures	ALP	CAP Based on 04/01/2023 - 03/31/2024 Performance	CAP Based on 04/01/2024 - 03/31/2025 Performance	State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4
Nonmonetary Determination Quality - Separations	≥ 75%	59.68%	*53.80%	Target	60.0%	60.0%	60.0%	61.0%	62.0%	66.0%	71.0%	75.0%
				Actual	47.9	65.3%	50.1%	47.9%				
Regional Office Comments in cell below:												
Corrective Action Plan Summary												
The Summary must provide: Alternate Year Plan Updates A. The Reason for the deficiency. It should be noted up front MDUA is in the process of modernizing our UI administrative system (EMT). This is impactful to this conversation because we have used our most experienced UI staff to be subject matter experts in the development and implementation of the new system. Having said this, we are cautiously optimistic with the progress we've made over the past few years with improving the quality of non-monetary determinations. The primary reason is attributed to staff not seeking rebuttals or additional information when warranted. This continues to be an ongoing challenge for staff to go back to the interested parties for the information.												
Alternate Year Plan Updates DUA has not met the acceptable level of performance for Nonmonetary Determination Quality for separations for several reasons. The primary reason is the implementation of a new UI system that MDUA implemented in May 2025. It was a transition period where staff were getting comfortable with using the system for adjudication. Another reason that attributed to the deficiency is staff not seeking rebuttals or additional information when warranted. This continues to be an ongoing challenge for staff to go back to the interested parties for the information. Another reason is the agency's focus on reducing backlog after the rollout period. It was prioritized that the number of backlog cases be addressed, which could be attributed to the deficiency in quality.												
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc.. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. MDUA will continue to engage the various business units in a weekly meeting in order to identify training and deficiencies with determining non-monetary determinations. During the last SQSP cycle we saw improvements in quality as a result of our efforts to have more training, continue to have supervisors provide quality feedback based on BTQ style scoring they perform, and continue to keep training participants engaged in training, regardless of the format. In addition, the monthly meeting used in the past to have Contact Center management, UI Performs and Program Integrity staff.												
Alternate Year Plan Updates DUA is going to focus on improving the quality of work by implementing a number of changes. There will be designated and experienced staff reviewing the cases to ensure accuracy and uniformity in the feedback. Adjudication supervisory staff will hold weekly meetings with their team to go over trends they are seeing Adjudication supervisory staff will meet with appropriate parties on a monthly basis to brainstorm how can staff apply what they learn in training when they return to their work duties. UIPP will continue to engage with UI Performs in order to address the deficiencies found with separation non-monetary issues. A BTQ action plan has also been put in place for MDUA and there is a workgroup who meets regularly to discuss ways to improve quality.												
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful. Much of what MDUA was doing proved to be beneficial for the ultimate goal of improving quality. This is why we are continuing our past actions with modifications when needed.												
Alternate Year Plan Updates The actions in the plan from the previous year were not successful in improving performance due to the transition to a new UI system. It was all hands on deck to get up to speed with mastering the new system and resources went to ensuring calls were being answered and staff were supported taking those calls. The actions now specified will be more successful because staff have acclimated to the new system, the backlog has decreased and the action plan that MDUA has in place will be beneficial to improving the quality of separation issues.												
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. MDUA will continue to engage all relevant staff and management in an effort to keep focused on bringing our level of performance to a satisfactory level. This includes operational units working with UI Performs staff to ensure we have the best information available.												
Alternate Year Plan Updates DUA will continue to ensure all staff's cases are being reviewed on a regular basis, as stated above, and the cases are discussed with staff. UIPP will provide feedback as needed and the adjudication supervisory staff will continue regular meetings with their staff to discuss any areas where quality in non-monetary issues is lacking. MDUA will continue to engage with UI Performs and analyze BTQ quarterly reviews to ensure quality standards are being met and address any deficiencies that arise.												
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved.												
(Enter Remaining Major Actions Here)												
Milestones												
1. Continue regular weekly meetings to monitor deficiencies, whether systemic or ad hoc, in order to provide valuable insight into coaching and training needs.												Completion Date
												9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Weekly meeting continued throughout this quarter in order to identify coaching and training needs. Our data shows there is a strong correlation between poor performance and staff hired during the pandemic. We are aggressively exploring training plan to run parallel with training in our new EMT system in an effort to build knowledge. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Weekly meetings continued throughout this quarter in order to identify coaching and training needs. A new training initiative was implemented during the quarter and early results show a positive trend. FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Weekly meetings continued throughout this quarter in order to identify coaching and training needs. A new training initiative was implemented during the quarter and early results show a positive trend. Since our new UI administrative system went live we continue to learn new ways to monitor this work. FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Weekly meetings continued throughout the quarter. Staff completed a survey to identify which areas they are struggling in so the agency can determine where additional coaching and training is needed. FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):												
2. Continue a training approach which has participants be more engaged.												Completion Date
												9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): New training mentioned in milestone #1, will include new strategies for training. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): New training mentioned in milestone #1, will include new strategies for training. FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): New training mentioned in milestone #1, will include new strategies for training. All training relative to the new system has been updated to reflect our administrative environment FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): During this quarter, training sessions have been primarily in person, which has participants more engaged by asking them questions, having them complete case studies and roleplay together. This has been effective in the participants' understanding of the material. FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):												

3. Continue to engage all relevant business units within DUA to provide feedback and technical assistance to training and coaching opportunities.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Engagment during this period included the UI Director, Benefit Operations staff, UI Performs staff. We will continue with this core group to work through a solution. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Engagment during this period included the UI Director, Benefit Operations staff, UI Performs staff. We will continue with this core group to work through a solution. FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Engagment during this period included the UI Director, Benefit Operations staff, UI Performs staff. We will continue with this core group to work through a solution. In addition, our Training team has been augmented by the addition of a new staff member. FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): During this quarter, managers and Directors engaged in meetings with training and OCM to provide feedback on what areas their staff are struggling in, what pain points they are experiencing, so that the team can provide additonal training, guides, etc. The survey conducted for all benefits business areas also provided staff an opportunity to provide feedback on what areas they would like more support in and where they don't feel confident. FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
4. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
5. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
6. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

7. (Enter next milestone here)		Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		

New Employer Time Lapse												
Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report					Back to Biennial Overview 2025				Back to Alternate Overview 2026			
State: Massachusetts					Federal Fiscal Year 2025				Federal Fiscal Year 2026			
Performance Measures	ALP	CAP Based on 01/01/2023 - 12/31/2023 Performance	CAP Based on 01/01/2024 - 12/31/2024 Performance	State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4
New Employer Status Determinations Time Lapse	≥ 70%	68.90%	58.80%	Target	67.0%	68.0%	60.0%	70.0%	70.0%	70.0%	70.0%	70.0%
				Actual	61.3%	58.8%	54.9%	65.4%				
Regional Office Comments in cell below:												
Corrective Action Plan Summary												
The Summary must provide: Alternate Year Plan Updates A. The Reason for the deficiency. DUA is not currently meeting the performance measure for timely new employer status determinations for the following reasons: 1. The modernized tax system went live on 9/11/2023 which explains the decrease in our measure beginning with Q4 2023. While we have been live for a year, we are still stabilizing our operations and the system functionality. While we are not currently meeting the measure, it has slowly started increasing since go-live. Preliminary performance measures for Q3 show this measure has increased to 65% from 61% in Q2. We continue to work with the COTS system developers to enhance the system to assist with this measure. 2. MA is experiencing an increase in fictitious employer accounts. To combat this influx, we have implemented a business rule where retroactive employer registrations must be validated by staff prior to establishment of the UI account. Unfortunately, this does result in a delay in establishing new UI accounts for non-fictitious employers. We are currently working on implementation of a new Tax Integrity Unit as well as system enhancements to enhance our performance with this measure while combating employer fraud. 3. DUA also receives wage reporting for MA wages subject to withholding. This adds a layer of complexity for employers in MA that initially register with us as not subject only to report withholding wages but later reach the threshold for subjectivity to UI.												
Alternate Year Plan Updates												
This measure declined over the last review periods due to operational demands to staff a modernization project, post-modernization stabilization of the system, and staffing deficiencies and training needs. While this performance measure is starting to increase, we have more improvements to make in order to achieve the minimum performance standard and eventually meet the national goal of 90%. The improvements we've made include 1. implementation of a self-service function to allow for more timely requests of liability redeterminations from employers and 2. established a new tax integrity unit to allow for more timely review of registrations, 3. while this work continues, the Deputy Director of Revenue continues to work on updating procedures and staff training materials post modernization and 4. Tax integrity staff leverage the NASWA Employer Data Hub to report any identified fictitious employers and also work closely with Program Integrity staff when data is received from other states related to fictitious employer registrations.												
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. To achieve the acceptable level of performance, DUA is doing the following: 1. We continue working with the COTS developer on implementation of three key system enhancements to assist with this measure. These fixes will require staff training on the updated functionality which will include A. self-service option for not-subject employers to request redetermination of their liability including the development of a new letter encouraging employer to use the self-service option B. new functionality to streamline and support redetermination of employer liability in cases where the employer has multiple periods of subjectivity C. new functionality to support processing of certain business transfer cases. We are expecting these enhancements to be deployed to the PROD environment by Q1 2025. 2. Due to the national influx of fictitious employers, DUA is in the process of establishing a new Tax Integrity team within the Revenue Department. DUA hopes to hire this team by the end of Q1 2025. This team will be responsible for reviewing employer registrations to ensure timely review upon receipt of the registration. 3. Continue working with COTS developer on system enhancements to further support timely detection of fictitious accounts including A. development of cross-matching interface with MADOR to support cross-validation of FEINS at registration B. development of extract for the new NASWA EDM functionality. We hope to have both of these enhancement deployed in production by Q2 2025. 4. Development of new procedures to support staff training and quality control efforts following implementation of enhancements.												
Alternate Year Plan Updates												
We continue to explore functionality to leverage the new system and improve on this measure. We have already identified functional updates such as 1. development of a new functionality and letter to drive more requests for redeterminations at the point wages are reported. Currently functionality exists as a stand alone self-service option. This enhancement would more actively drive employers to timely requests for redeterminations 2. development of a new data-sharing interface with DOR to increase efficiency with reviewing employer registrations 3. increased automation of data from the NASWA data hub to increase efficiency with reviewing employer registrations and 4. in October 2025, MA DUA increased staffing available to complete this work. We will identify and address training gaps with new staff performing these functions.												
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful. A plan was not in place the previous year.												
Alternate Year Plan Updates												
A plan was in place last year and through that plan we were able to push forward enhancements to assist with this measure. The new plan will address remaining changes that were hoping to address with the prior plan but were unable to prioritize due to time constraints and prioritization of stabilizing DUA after our second go-live on May 5, 2025. With EMT more stabilized and two go-lives behind us, this plan will help move forward the additional changes to help increase our performance in this measure.												
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. The DUA Revenue Director meets weekly with the COTS developer and post production team to monitor progress on the key system enhancements to support this functionality. Specific meetings to discuss progress and test the updates with SMEs will also be scheduled. Each quarter the Revenue Director and TPS/DV Coordinator will monitor progress towards achievement of the timeliness measure using quarterly DV measures. Following implementation of the enhancements, the new functionality will be monitored by Revenue SMEs by conducting QC following completion of work. If any new defects arise, the defects will be documented using the COTS project management tool, then prioritized for work by the Revenue Director.												
Alternate Year Plan Updates												
The DUA director will meet monthly with the new DUA EMT business and strategy manager to discuss, plan, and receive periodic updates on these enhancements to the new system and ensure changes needed for this plan are moving forward. The Revenue Director and Deputy Director of revenue will continue to meet with the TPS/DV Coordinator on a quarterly basis to monitor progress on this plan. Following implementation of the new enhancements, staff will monitor the functionality by sampling cases to ensure it's working as expected and report any subsequent issues through our dedicated ticketing system.												
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved. (Enter Remaining Major Actions Here)												
Milestones												
1. Continue working with COTS developer on system enhancement to allow for self-service of redetermination of liability, including development of new quarterly letter to not subject employers reminding them of the liability thresholds to UI and instructions on how to self-serve a redetermination.											Completion Date	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):											6/30/2025	
Enhancements to allow self-service redetermination of liability is currently undergoing testing. This update is being implemented along modernization of the benefits side of the new COTS system. This update is expected to go-live in May 2025. Any issues related to this update will be addressed during stabilization of the new system. Further enhancements, such as the new letter reminding not-subject employers on their UI requirements is expected to be implemented post-stabilization of the benefit functionality.												
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):												
Enhancements to allow self-service redetermination of liability is were tested through the end of April 2025 and were implemented with the COTS system in May 2025. As a result, Q1 metrics further decreased since we had to devote resources to the testing and implementation effort. Staff are learning the new system updates, monitoring the new functionality and working with the COTS developer to address any issues.												
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):												
Enhancements to allow self-service redetermination of liability is were tested through the end of April 2025 and were implemented with the COTS system in May 2025. As a result, Q1 metrics further decreased since we had to devote resources to the testing and implementation effort. Staff are learning the new system updates, monitoring the new functionality and working with the COTS developer to address any issues.												
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):												
We still plan to implement additional enhancements with the COTS developers but further enhancements have not been prioritized for work as we are still focused on stabilizing post go-live of the benefits system.												
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):												
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):												
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):												
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):												
2. Develop standard operating procedures, document new processes related to system enhancements, and train staff to support team efficiency, productivity and timely review of registrations.											Completion Date	
											12/31/2025	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):												
The Revenue department has made several staffing updates including hiring a new Deputy Director of Revenue in February 2025 and establishment of a new Tax Integrity Unit. The Tax Integrity Unit is fully staffed as of March 2025. The new Deputy Director of Revenue is taking the lead on standardization and development of SOPs and documentation related to the new Tax Integrity Unit are in progress. Tax Integrity staff have taken on reviews of employer registrations and are working toward completion of training of staff. Staff were onboarded later than expected and we have adjusted the expected completion date for this milestone to Q3.												
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):												
The Deputy Director of Revenue is moving forward with standardization and development of SOPs. First round of meetings for these efforts concluded in February and follow up meetings with departments will continue through June 2025. The Tax Integrity team is fully staffed as of February 2025 and we continue training and refining processes.												
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):												
The Deputy Director of Revenue is moving forward with standardization and development of SOPs. As of the end of Q2, we estimate 35% completion on efforts to document SOPs and/or updated SOPs. First round of meetings for these efforts concluded in February and follow up meetings with departments will continue through June 2025. The Tax Integrity team is fully staffed as of February 2025 and we continue training and refining processes. These meetings will occur as needed until we complete this effort.												
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):												
The Deputy Director of Revenue continues to make progress on standardization and development of SOPs. We continue to take a hands-on approach with staff following go-live and meet with teams weekly to ensure any outstanding questions are answered. As of July 2025, supervisors report productivity data to the director and deputy director of revenue weekly. This data is reviewed and used in to identify any training needs and to ensure work is being prioritized appropriately by supervisors.												
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):												
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):												

FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):

FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):

3. Continue working with COTS developer on enhancements related to the new Tax Integrity functionality including new interfaces with MA DOR to support FEIN validation of employer registrations and new NASWA EDM functionality.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): DUA met with the COTS developer to determine the scope of work related to Tax Integrity functionality. The interface with MA DOR is expected to go live with the modernized benefits system in May 2025. Subsequent enhancements are planned post stabilization of the new system such as enhancements to the fraud lead functionality, automation or enhancements of data extracts needed for NASWA EDM.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): The interface with MA DOR was tested through April 2025 but did not go live with the new system. Staff are continuing to work with COTS developer on implementation of the new interface and on further enhancements related to tax integrity functionality.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): The interface with MA DOR was tested through April 2025 but did not go live with the new system. Staff are continuing to work with COTS developer on implementation of the new interface and on further enhancements related to tax integrity functionality.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): We still plan to implement additional enhancements with the COTS developers but further enhancements have not been prioritized for work as we are still focused on stabilizing post go-live of the benefits system.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
4. Revenue Director and TPS/DV coordinator to monitor progress toward achievement of timeliness measure using quarterly values.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): A recurring meeting with the Director of Revenue, Deputy Director of Revenue and DUA TPS coordinator has been set up and occurs on a quarterly basis.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): TPS and DUA Revenue Director and Deputy Director met to discuss Q1 metric. As expected due to reallocation of resources, the Q1 metric decreased. This meetings are recurring and will continue to meet to discuss.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): TPS and DUA Revenue Director and Deputy Director met to discuss Q2 metric. As expected due to reallocation of resources, the Q2 metric decreased. This meetings are recurring and will continue to meet to discuss.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Quarterly meetings continue. This meetings are recurring and will continue to meet to discuss new findings or potential solutions. We are happy to report that this measure increased in Q3 to 65%.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
5. Revenue Director to meet weekly with COTS developer and Revenue SMES to monitor, support testing, and receive status updates on progress toward implementation of enhancements to support achievement of this measure.	Completion Date
	12/31/2025
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): The Revenue Director has recurring meetings with the COTS developer. However, any enhancements, other than emergency fixes, are frozen until May 2025 when we go live with the benefits functionality of the COTS system. Separately, a recurring meeting with COTS developer and SMES occurs 2-3x per week related to the milestone 1 enhancements to answer any questions, clarify business rules and address any testing findings. An all staff meeting for Revenue managers/supervisors occurs on a monthly basis with the Director and Deputy Director of Revenue to discuss any system issues or questions. Individual units have scheduled weekly or biweekly meetings with their wider teams to discuss any questions or concerns related to daily system or business operations.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Revenue Director continued to meet with COTS developer through Q1. However, any enhancements, other than emergency fixes were frozen. During the time only urgent issues were worked with approval. Recurring meetings with SMES continued as we continued to work on systems that were expected to go live in May 2025.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Revenue Director continued to meet with COTS developer through Q2. However, any enhancements, other than emergency fixes were frozen. During the time only urgent issues were worked with approval. Recurring meetings with SMES continued as we continued to work on systems that were expected to go live in May 2025.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): We still plan to implement additional enhancements with the COTS developers but further enhancements have not been prioritized for work as we are still focused on stabilizing post go-live of the benefits system.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
6. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

7. (Enter next milestone here)		Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		

Tax Quality														
Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report						Back to Biennial Overview 2025				Back to Alternate Overview 2026				
State: Massachusetts						Federal Fiscal Year 2025				Federal Fiscal Year 2026				
Performance Measures	ALP	CAP Based on 01/01/2023 - 12/31/2023 Performance		CAP Based on 01/01/2024 - 12/31/2024 Performance		State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4
		Status Inact/Term	Status Inact/Term	Target	X	PASS	X	X	X	X	PASS	X	X	
				Actual	X	FAIL	X	X	X	X	X	X		
				Target	X	PASS	X	X	X	PASS	X	X		
				Actual	X	FAIL	X	X	X	X	X			
Regional Office Comments in cell below:														
Corrective Action Plan Summary														
The Summary must provide: Alternate Year Plan Updates A. The Reason for the deficiency. For the 2023 review year, MA DUA failed Status/Inactive/Term due to a defect in our legacy system, UI Online, where employer accounts that had zero or no wage filings for 8 consecutive quarters were not suspended by the system. MA DUA modernized into a new system September 2023 and this is resolved. The accounts that were not suspended were subsequently suspended in the new system. Similarly, the other failure for the 2023 review year was due to our legacy system not sending employers a notification of their unapplied credits related to the UI program. This notification was developed and implemented into our new system. The first letter was issued in October 2023.														
Alternate Year Plan Updates The status/Inactive/Term failed due to a display issue in the new system. The new system, EMT, provides staff with multiple screens to access information regarding accounts, some of which can be duplicative. The TPS reviewer found in cases sampled that a data point for the Status & Liability End Date was not accurately reflected on a specific screen in EMT. The TPS reviewer confirmed the information is correctly reflected in other screens in the system. The Credit/Refund function failed as the TPS reviewer could not confirm the credit amounts due to lack of details displayed on the transactions in the system.														
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. Both failures have been resolved. MA DUA worked closely with the COTS development team in defining the new system rules and functionality. The new EMT system successfully suspended accounts that the legacy system did not fail timely. The new EMT system is also sending a monthly credit balance statement. We are now focused on monitoring and QC of these two functions. The TPS/DV coordinator did find a subsequent defect in the credit balance statement where the credit balance statement was excluding certain credits. This issue has already been resolved. Any subsequent defects related to these functions will be documented and fixed in partnership with the COTS developer														
Alternate Year Plan Updates To address both of these findings we will take the following actions 1. Undergo business analysis to review current screen layouts and data visibility and understand how different business units are utilizing the currently available screens/data points 2. Determine if the TPS findings are due to training gaps, display issues only or both 3. If there are training gaps, document and schedule any needed trainings 4. If there are technical updates needed, work with developers to identify the system update, test, and implement the update in the production environment.														
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful. There wasn't a plan in the previous year. Alternate Year Plan Updates The plan in place last year for credit/refunds was to address a different issue which was that MA DUA was not notifying employers of their credits. That issue has been resolved. The plan in place this year is to address a new finding regarding the reconciliation of credits attributable to UI on the notice. The plan in place last year related to status/inactive/term was also related to a separate issue in our legacy system which is now resolved. This year's plan is related to a new finding which will be investigated further to determine appropriate next steps for resolution.														
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. Using the new system's report functionality, MA DUA monitors/samples the credit balance statement and administrative suspensions on a quarterly basis for accuracy. Any defects identified are documented using the COTS developer's project management tool and prioritized for work by the Revenue Director.														
Alternate Year Plan Updates The Revenue Director and Deputy Director of revenue will continue to meet with the TPS/DV Coordinator on a quarterly basis to monitor progress on this plan. Following implementation of the new enhancements or staff training, supervisors will monitor the system by sampling cases to ensure it's working as expected and report any subsequent issues through our dedicated ticketing system.														
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved. (Enter Remaining Major Actions Here)														
Milestones														
1. Staff conduct quarterly QC of the administrative suspension functionality in the new system to ensure the legacy system defect has been resolved.													Completion Date	
													3/31/2025	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Staff conduct QC of administrative suspensions. Any issues found are reported to the COTS developer for resolution. This function is being reviewed again in the next review year. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): This is completed and is working as expected. This was confirmed during 2024 TPS review. FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): This is completed and is working as expected. This was confirmed during 2024 TPS review.														
2. Using the reporting functionality in the new system, monitor monthly credit balance statement for accuracy.													Completion Date	
													3/31/2026	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): This correspondence is new to the modernized system. Staff can QC this correspondence using the reporting functionality in EMT; This function failed in the new review year. Results of the TPS review will be submitted to DOL by the end of March. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Functionality was reviewed but failed due to the same defect. Revenue Director continues to work with COTS developer to address the issue. Two defects were fixed and this function will be reviewed again in July 2025. FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): The universe for this review needs to be redone; TPS coordinator is working with the COTS developer. Two defects were fixed and this function will be reviewed again in August 2025. FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): We continue to monitor and more investigation is required to improve accuracy of credits attributable to UI. We continue to work with COTS developers, TPS/DV coordinator on enhancements needed to verify credits attributable to UI. FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):														

3. Resolve defect discovered in Q1 review related to liability end date.	Completion Date
	3/31/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): New defect was not discovered until Q1. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): New defect discovered related to the liability end date on a suspension screen. The suspension processing is working correctly but there is a display issue on one of the screens. The Revenue SME will work with COTS developer to address this issue for resolution. This will be reviewed again in March 2026. FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): We are planning to resolve the newly identified issue before the next review in March 2026. FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): We are planning to resolve the newly identified issue before the next review in March 2026. FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
4. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
5. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
6. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

7. (Enter next milestone here)		Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		

Effective Audit Measure (EAM) - Score ≥ 7; exceed all 4 factors												
Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report						Back to Biennial Overview 2025				Back to Alternate Overview 2026		
State: Massachusetts						Federal Fiscal Year 2025				Federal Fiscal Year 2026		
Performance Measures	ALP	CAP Based on 01/01/2023 - 12/31/2023 Performance	CAP Based on 01/01/2024 - 12/31/2024 Performance	State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4
EAM - Factor 1 (Contributory Employers Audited)	Score ≥ 1	0.30	0.3	Target	0.2	0.5	0.8	1.0	0.2	0.5	0.8	1.0
				Actual	0.3	0.4	0.4	0.5				
EAM - Factor 3 (Total Wages Audited)	Score ≥ 1	0.50	0.70	Target	0.2	0.5	0.8	1.0	0.2	0.5	0.8	1.0
				Actual	0.7	0.2	0.2	1.0				
EAM - Factor 4 (Avg # of Misclassified Workers Detected per Audit)	Score ≥ 1	N/A	0.70	Target					0.3	0.6	0.9	1.0
				Actual								
Effective Audit Measure Total Score	Score ≥ 7	N/A	3.8	Target					2.0	4.0	6.0	7.0
				Actual								
Regional Office Comments in cell below:												
Corrective Action Plan Summary												
The Summary must provide:												
A. The Reason for the deficiency. MA DUA did not meet EAM factor 1 and factor 3 in review year 2023 for the following reasons 1. For the majority of 2023 MA DUA was not actively auditing, but focusing on completion of older audits. This was part of a larger effort to complete work and clear out backlogs leading up to conversion into the new system. 2. Following modernization, audit staff were reassigned to help other business units and provide customer service for a few months after go live in September 2023. And 3. The audit department currently has 6 vacant audit positions. Given the employer population in MA, we do not expect to meet Factor 1 until we are fully staffed. We resumed normal business practices and auditors are back to auditing. As auditors become more comfortable with the new system, we are slowly increasing our audit measure for Factor 3 and have increased our selection of large employers in hopes of meeting this measure by 2024 Q4.												
Alternate Year Plan Updates												
DUA continues to struggle to audit performance measures due to staffing challenges. The modernized tax system went live in September 2023. The audit team was assigned to assist with stabilizing revenue functions and assisting with much needed customer service. We resumed auditing in 2024 and audit staff were recalled to a hybrid schedule along with the rest of the agency in May 2024. MA DUA also revisited audit procedures to adjust for a new hybrid and remote audits, with a final audit manual issued in January 2025. The audit unit currently consists of 14 full time auditors completing approximately 90 audits per year. The MA employer population is approximately 250k; in order to meet Factor 1, MA DUA needs to hire 13-14 additional auditors. Given the significant staffing need, we do not expect to meet Factor 1 and total EAM until we are fully staffed and staffing is proportionate to the employer population in Massachusetts. Despite our staffing challenges, it may be possible to obtain Factor 3 and Factor 4 with strategic assignment of audits.												
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. We have resumed normal business processes following modernization and we are now focused on staff training and updates to procedures to maximize our productivity with our current staffing. We are slowly implementing changes to the unit such including 1. Misclassified worker status investigations referred by the benefits department are now handled by the audit team. Following determination of the status investigation, the audit team is setting up the employer for a full audit to identify any other misclassifications or other findings. 2. Since January 2024, we have been working with labor relations to update our processes and procedures to issue to staff. We have issued procedures on handling of status investigation referrals from the benefits department. We have reworked the conduct audit manual to address remote audits, clarify the path for escalation when employers are nonresponsive, and clarify procedures for non-audits. 3. We are planning on staff trainings and weekly or bi-weekly check-ins with the audit supervisor and auditors to reinforce audit procedures and troubleshoot any challenges. 4. Revenue director has weekly check ins with the audit manager to monitor and discuss any challenges with attainment of Factor 3 and assist with implementation of procedures. While we are focused on maximizing our efficiency with our current staff, we do not expect to meet Factor 1 until the unit is fully staffed.												
Alternate Year Plan Updates												
While we do not expect to be financially able in the near future to hire another 13-14 auditors to meet Factor 1 and total EAM, we are planning on making other adjustments to maximize our current staff. 1. We are currently working with Labor Relations on revisiting audit metrics to change individual auditor metrics from 90 completed audits per review year to 10 completed audits per month. 2. To increase our performance with Factor 4, we plan on assigning a higher proportion of audit cases from referrals sent to DUA via the MA Council Against the Underground Economy and pursuing complete audits of employers involved in a Section 2 worker misclassification case through an active claim 3. To assist with Factor 3, we also plan on assigning a higher proportion of large employers. 4. We also plan on exploring the feasibility of consuming IRS data related to 1099s to further enhance our audit discovery model in the new system.												
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful. There was a plan in place for FY 2024. This is a continuation of that plan as due to the union environment, implementation of changes and issuance of new staff procedures can take time as it requires collaboration with MA DUA labor relations and the union. As the plan relates to Factor 1, MA DUA will not meet this measure until the unit is fully staffed.												
Alternate Year Plan Updates												
As stated in the prior plan, MA DUA cannot meet Factor 1 and total EAM without a significant staffing increase. This new plan can only assist with increasing our performance in Factor 4 and Factor 3 through strategic assignment of audits and enhancements to the audit discovery model in the new system as these are actions we can take without any additional staff and funding.												
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. The Audit manager is working with labor relations to finalize audit procedures and issue to staff by the end of 2024 Q4. Following implementation of new procedures, the audit manager and audit supervisor will implement trainings, weekly or bi-weekly check-ins with the audit team to monitor adherence to procedures and help troubleshoot any challenges and answer questions.												
Alternate Year Plan Updates												
The Revenue Director and Deputy Director have started conversations with Labor relations on the proposed increase in audits per auditor. We will check in on any progress each month to ensure the ask is being reviewed by the bargaining union. The department manager will monitor progress on these metrics on a monthly basis. The department manager also has weekly check ins with the audit supervisor and will monitor adherence to strategic assignment of audits. The DUA director will meet monthly with the new DUA EMT business and strategy manager to discuss, plan, and receive periodic updates on these enhancements to the new system and ensure changes needed for this plan are moving forward.												
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved. DUA does not expect to pass Factor 1 until we significantly increase our staffing levels in the Revenue Audit department. We are exploring the financial feasibility of increasing staffing in this unit. However, the expected date has not been determined.												
Milestones												Completion Date
1. Issue finalized audit manual to staff and conduct any necessary re-trainings.												9/30/2025
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Updated audit procedures and finalized manual were distributed to audit staff January 2025 and were effective immediately. Meetings were held with the Revenue Audit supervisor and auditors to address any questions or clarify updates. The Deputy Director of Revenue was promoted in February 2025 and is working on identifying any applicable re-training such as customer service 101, decalcation training, NASWA trainings and identification of misclassified workers. We are planning on completing customer service, deescalation training and refresher training on identifying misclassified workers by the end of April 2025.												
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Updated audit procedures were delivered to staff in January 2025. The Revenue Audit supervisor, Revenue Director and Deputy Director met with staff to address any questions. The Audit supervisor is monitoring adherence to procedures closely and supports staff through regular team and individual check ins. A new Audit Manager was hired in May 2025 who is now working with the Audit supervisor to finalize additional training needs and assign training modules to audit staff. We now expect additional trainings to be completed by June 2025.												
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): The manual was completed and reissued to staff as of January 2025. New training needs were identified and staff completed required trainings as of July 2, 2025.												
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): The manual was completed and reissued to staff as of January 2025. New training needs were identified and staff completed required trainings as of July 2, 2025.												
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):												
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):												
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):												
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):												
2. Audit manager and audit supervisor to schedule bi-weekly check in with audit team to provide support and monitor performance and adherence to procedures.												Completion Date
												6/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Audit supervisor and manager have recurring bi-weekly check-ins with the audit team. The audit supervisor also has individual one-on-one check ins with each auditor to discuss performance and address any questions.												
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Audit supervisor and manager have recurring bi-weekly check-ins with the audit team. The audit supervisor also has individual one-on-one check ins with each auditor to discuss performance and address any questions.												
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Audit supervisor and manager have recurring bi-weekly check-ins with the audit team. The audit supervisor also has individual one-on-one check ins with each auditor to discuss performance and address any questions. Managers and supervisors are reporting weekly productivity data from the COTS system as of 7/14/25. Part of this review includes reviewing how many audits are completed and moved onto another stage.												
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Audit supervisor and manager have recurring bi-weekly check-ins with the audit team. The audit supervisor also has individual one-on-one check ins with each auditor to discuss performance and address any questions. Managers and supervisors are reporting weekly productivity data from the COTS system as of 7/14/25. Staff with performance issues have been informed they may be required to increase their time in the office for additional supervision and training. Notices to underperforming staff increasing their time in the office for additional training will be issued by the end of December.												

FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):

FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):

FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):

FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):

3. Using EMT report functionality monitor performance as it relates to Factor 1 and Factor 3.	Completion Date
	9/30/2025
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): The audit manager and audit supervisor monitor the programs performance on a quarterly basis. Additionally a new operational report was also developed and implemented in January 2025 that provides more detailed insight into actions taken on audits by each auditor. Monitoring will continue.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): The audit manager and audit supervisor monitor the programs performance on a quarterly basis. The audit supervisor is also monitoring individual auditor performance on a monthly basis and addressing any questions or performance issues during individual check ins.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): The audit manager and audit supervisor monitor the programs performance on a quarterly basis. The audit supervisor is also monitoring individual auditor performance on a monthly basis and addressing any questions or performance issues during individual check ins.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): The audit manager and audit supervisor monitor the programs performance on a quarterly basis. The audit supervisor is also monitoring individual auditor performance on a monthly basis and addressing any questions or performance issues during individual check ins. Created a new milestone based on new performance measures.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
4. Adjust ratio of assigned audits to include a higher percentage of referrals, employers involved in a status investigation and large employers.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Not applicable	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Not applicable	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Not applicable	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Decreased the proportion of randomly assigned audits. As of September, assigning out audits aiming for 60% of assignments from referrals and 40% from random discovery. We are planning on increasing this for Q2- 90% audit assignments from referrals and 10% from random discovery.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
5. Use EMT reporting functionality to monitor progress toward Factor 1, 3, 4 and overall EAM.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Not applicable	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Not applicable	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Not applicable	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): The audit manager and audit supervisor monitor the programs performance on a quarterly basis. The audit manager also meets with the supervisor weekly to discuss staff performance, adherence to new directives regarding assignment of audits. The audit supervisor is also monitoring individual auditor performance on a monthly basis and addressing any questions or performance issues during individual check ins.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
6. Implement enhancements to the EMT audit discovery model to assist with Factor 3 and Factor 4	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Not applicable.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Not applicable.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Not applicable.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Identified potential new data to implement into the audit discovery model. The feasibility of this change needs to be explored further with the COTS developer. DUA also needs to request information from the IRS to ensure we can meet any compliance requirements associated with receiving the data.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

7. (Enter next milestone here)		Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		

Improper Payments Measure												
Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report					Back to Biennial Overview 2025				Back to Alternate Overview 2026			
State: Massachusetts					Federal Fiscal Year 2025				Federal Fiscal Year 2026			
Performance Measures	ALP	CAP Based on PIA Year 2023 BAM Batches 202227 - 202326	CAP Based on PIA Year 2024 BAM Batches 202327 - 202426	State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4
Improper Payments Measure	< 10%	24.38%	21.46%	Target	22.00%	20.00%	18.00%	16.00%	14.00%	12.00%	10.00%	10.00%
				Actual	20.40%	18.58%	18.19%	15.96%				
Regional Office Comments in cell below:												
Corrective Action Plan Summary												
The Summary must provide:												
Alternate Year Plan Updates												
A. The Reason for the deficiency. MADUA has struggled with normal operations due to the need to reallocate resources to address high call volume and issue backlog. MADUA continues to need to allocate resources to address resolution of fraudulently claims and hacked accounts. The need to address the on-going "clean up" of these claims has cause MADUA to struggle with the work of regular UI business, which has contributed to improper payment of benefits. The delays related to backlog and "clean work" have caused improper payments associated with other non-monetary issues and causes MADUA to be unable to audit and review staff work as much as needed.												
Alternate Year Plan Updates												
MA DUA continued to struggle with the need to allocate staff to work on cleanup of past fraudulent and hacked claims during this period. Clean up of these accounts took time and staff away from investigation of improper payments on other non-monetary issues. After the rollout of the modernized UI system in May 2025 there was an adjustment period for MA DUA staff and claimants alike, which resulted in the need to address backlogged issues and high call volume due to claimants needing assistance with navigating the new system. Due to this, there was a natural reduction in staff assigned to engage in work designed to reduce improper payments.												
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. MADUA continues to review all or business processes and with the modernization of our system on May of 2025 looks to streamline processes which collect information associated with the adjudication of the issues types which are causing improper payments. In addition to our internal reviews and analysis, MADUA continues to work with deveolpers to better intergrate and automate the fraud analytics into the current UI system while hiring additional staff to handle manual workload related to integrity investigations. MADUA continues to streamline issue workflows so the agency can detect potential improper payments earlier in the claims process and has dedicated additionally resources and staff to address benefit year earnings.												
Alternate Year Plan Updates												
MADUA continues to monitor business processes and will continue to make changes to address improper payments. Additional staff continued to be added to address benefit year earnings issues. Additional, direct messaging will be provided to claimants up front to inform them of the requirements to report worksearch and benefit year earnings, in an attempt to reduce improper payments in those categories. Additionally, MA DUA continues to work with its data analytics partner to streamline and automate additional identity verification processes, in order to keep improper payments on fraudulent accounts low, and to reduce the number of staff required to handle manual identity verification work, so that those staff can be re-dedicated to working issues that directly impact improper payments												
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful. While MADUA's improper payment rate continues improve we still struggle with high fraud claims and continued attempts to defraud our UI system. Although we use a multi-layered approach high claim volume does not allow for individual staff review of all UI account and claim filings. This has slowed reduction of the improper payment rate. Phishing schemes which have created imitation MA UI online websites to obtain access to user accounts and passwords to divert and benefits to be improper paid. Additionally, MADUA implemented the national offering ID proofing solution and found this solution to be inadequate for the needs to MADUA. Addressing this deficiency caused system enhancements and department tasks to be re-prioritized. Several of these paused measure were to looked to improve the improper payment rate. MADUA continues to make adjustments to the current system although the cost and complexity of these changes determines if the changes will be implemented or if the concern will be addressed with the launch of our modernized system on May of 2025.												
Alternate Year Plan Updates												
While MADUA's improper payment rate has continued to drop, and measures taken to address high fraud claims have helped to mitigate the fraud volume, addressing those issues has still taken up time and staff resources to keep fraudulent claims at bay. So the need to have staff assigned to work on fraud prevention and cleanup has continued, taking staff away from work that would address improper payments.												
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. MADUA looks to successfully implement enhancements and then will monitor workflow related to enhancements and workload of resources to determine the impact and success of the implementation. MDUA will continue to monitor BAM error results to see any changes to the reason for these errors and the improper payment of benefits.												
Alternate Year Plan Updates												
MADUA has launched a new modernized UI system, replete with new methods of monitoring workflow and workload, which it will continue to review to update processes and increase training where needed, to ensure continued improvement in identifying improper payments. MADUA will continue to monitor BAM error results to see any changes to the reason for these errors and the improper payment of benefits.												
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved. (Enter Remaining Major Actions Here)												
Milestones												
1. MADUA's UI performs (BAM) unit to provide data regarding improper payments and findings regarding errors.											Completion Date	
											9/30/2026	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): BAM continues to complete federally-mandated case audits and provide data and findings regarding improper payment errors to MADUA management. The top 3 reasons for improper payment in Massachusetts continues to be worksearch, benefit year earnings, and separations.												
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): BAM continues to complete federally-mandated case audits and provide data and findings regarding improper payment errors to MADUA management. The top 3 reasons for improper payment in Massachusetts continues to be worksearch, benefit year earnings, and separations.												
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): BAM continues to complete federally-mandated case audits and provide data and findings regarding improper payment errors to MADUA management. The top 3 reasons for improper payment in Massachusetts continues to be worksearch, benefit year earnings, and separations.												
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): BAM continues to complete federally-mandated case audits and provide data and findings regarding improper payment errors to MADUA management. The top 3 reasons for improper payment in Massachusetts are worksearch, benefit year earnings, and ability/availability to work												
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):												
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):												
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):												
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):												
2. Program Integrity Director and UI Performs Director meet quarterly to discuss improper payments and findings											Completion Date	
											9/30/2026	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): The directors meet to discuss the improper payment data and findings. The top 3 reason for improper payments remians the same and MADUA's improper payment reason are align with many other states. MADUA's improper payment rate has dropped. A 12 month period ending 1st QTR 2024 showed MA's improper payment rate of 22.1% and a fraud rate over 9%. Data shows MADUA's improper payment rate continues to decrease with an improper payment rate of 20.4% and a fraud rate of 8.2%.												
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): The directors meet to discuss the improper payment data and findings. The top 3 reason for improper payments remians the same and MADUA's improper payment reason are align with many other states. MADUA's improper payment rate has dropped. A 12 month period ending 4TH QTR 2024 showed MA's improper payment rate as 18.58% and a fraud rate of 6.77% These rates continue to improve.												
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): The directors meet to discuss the improper payment data and findings. The top 3 reason for improper payments remians the same and MADUA's improper payment reason are align with many other states. MADUA's improper payment rate has dropped. A 12 month period ending 4TH QTR 2024 showed MA's improper payment rate is not available - not provided by ETA as of the date of completing this update for Q2 2025.												
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): The directors continue to meet to discuss the improper payment data and findings. The top 3 reason for improper payments remains the same and MADUA's improper payment reason are align with many other states. MADUA's improper payment rate has dropped. A 12 month period ending 3rd QTR 2025 showed MA improper payment rate at 15.2% with a fraud rate of 6.35%. These rates continue to improve.												
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):												
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):												
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):												

3. Provide continued support to adjudication staff working benefit year earnings to ensure proper investigation or determination of issues.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Since reestablishing an adjudication team focused on benefit year earnings in July of 2024, MADUA has reduced the BYE backlog by over 98% with no pending issues over 1 year. Having resolved the backlog, MADUA continues to address daily work while working to develop a new case review process to ensure quality of work and foster learning. In November of 2024, MADUA converted our NDNH/SDNH process to prepare for modernization. As we move towards modernization in May of 2025, MADUA continues to prepare staff of the change providing system training and support. MADUA is reviewing it current case audit processes to make changes that reflect current trends and the upcoming system modernization.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Since reestablishing an adjudication team focused on benefit year earnings in July of 2024, MADUA has reduced the BYE backlog by over 98% with no pending issues over 1 year. Having resolved the backlog, MADUA continues to address daily work while working to develop a new case review process to ensure quality of work and foster learning. In November of 2024, MADUA converted our NDNH/SDNH process to prepare for modernization. As we move towards modernization in May of 2025, MADUA continues to prepare staff of the change providing system training and support. MADUA is reviewing it current case audit processes to make changes that reflect current trends and the upcoming system modernization.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): MADUA continues to address daily work related to benefit year earnings.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): MADUA continues to address daily work related to benefit year earnings. Since rolling out our modernized benefit system in May 2025 we have continued to train additional staff to work on these issues along with refining our crossmatch parameters to uncover more and better quality earnings issues for investigation.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
4. Conduct audits of adjudication staff work to ensure proper investigation and adjudication of issue. This is an internal "BTQ" of staff work outside of the required quarterly BTQ.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): MADUA continues to address the daily adjudication of issues and audit of case load. While MADUA audits staff case work current procedures need to be updated to afford for better assessment of individual and department training needs. Developing an more comprehensive audit process for case review will improve MADUA's ability to identify any knowledge gaps and develop more effective subsequent trainings. MADUA continues to plan and adjust the current audit process for more effective department communication and learning. With modernization, MADUA will have additional tools and reporting to review staff work and other actions within the system.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): MADUA continues to address the daily adjudication of issues and audit of case load. While MADUA audits staff case work current procedures need to be updated to afford for better assessment of individual and department training needs. Developing an more comprehensive audit process for case review will improve MADUA's ability to identify any knowledge gaps and develop more effective subsequent trainings. MADUA continues to plan and adjust the current audit process for more effective department communication and learning. With modernization, MADUA will have additional tools and reporting to review staff work and other actions within the system.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): MADUA continues to address the daily adjudication of issues and audit of case load. While MADUA audits staff case work current procedures need to be updated to afford for better assessment of individual and department training needs. Developing an more comprehensive audit process for case review will improve MADUA's ability to identify any knowledge gaps and develop more effective subsequent trainings. MADUA continues to plan and adjust the current audit process for more effective department communication and learning. With modernization, MADUA will have additional tools and reporting to review staff work and other actions within the system.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): MADUA has continued to audit and train more staff on working earnings issues, along with providing refresher training for veteran staff to emphasize changes in the adjudication process within our new modernized UI system. We expect to increase the audits on staff as we get more settled in the new system and have more time to devote to individual case reviews.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
5. Continued practice of requiring MADUA new hires to complete NASWA associated training to enhance knowledge related to investigation and other daily job duties.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): All MADUA new hire continue to complete basic NASWA and any additional training associated with their program areas. MADUA looks to better utilize tools provided by NASWA in the future. MADUA management participates in NASWA/IDH regional meetings for BCP/Integrity and other UI areas. MADUA continues to work towards participation in the IDH's employer data hub and hopes to finalize after modernization of the benefits system. The IDH is utilized in MADUA's detection of improper payments and potential hacked accounts. Additionally, MADUA has begun planning a 2025 in-person visit with NASWA/IDH representatives, liekly to occur in the latter half of 2025.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): All MADUA new hire continue to complete basic NASWA and any additional training associated with their program areas. MADUA looks to better utilize tools provided by NASWA in the future. MADUA management participates in NASWA/IDH regional meetings for BCP/Integrity and other UI areas. MADUA continues to work towards participation in the IDH's employer data hub and hopes to finalize after modernization of the benefits system. The IDH is utilized in MADUA's detection of improper payments and potential hacked accounts. Additionally, MADUA has begun planning a 2025 in-person visit with NASWA/IDH representatives, liekly to occur in the latter half of 2025.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): All MADUA new hire continue to complete basic NASWA and any additional training associated with their program areas. MADUA looks to better utilize tools provided by NASWA in the future. MADUA management participates in NASWA/IDH regional meetings for BCP/Integrity and other UI areas.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): All MADUA new hire continue to complete basic NASWA and any additional training associated with their program areas. MADUA looks to better utilize tools provided by NASWA in the future. MADUA management participates in NASWA/IDH regional meetings for BCP/Integrity and other UI areas.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
6. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

7. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
8. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
9. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

Detection of Overpayments

Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report

[Back to Biennial Overview 2025](#)

[Back to Alternate Overview 2026](#)

State: Massachusetts

Federal Fiscal Year 2025

Federal Fiscal Year 2026

Performance Measures	ALP	CAP Based on 04/01/2023 - 03/31/2024 Performance	CAP Based on 04/01/2024 - 03/31/2025 Performance	State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4
Detection of Overpayments - Core Measure - ≥50% & ≤95% of Detectable/Recoverable Ops are Establishd for Recovery	≥ 50% & ≤ 95%	45.27%	49.69%	Target	48.00%	52.00%	55.00%	58.00%	63.00%	66.00%	69.00%	72.00%
				Actual	52.80%	52.10%						

Regional Office Comments in cell below:
RO: FY25 CAP waived on 2.18.2025 as performance was met with YE 12.31.2024 52.79%

FY2026: CAP has been added, however FY25 Q3 and FY 25 Q4 updates are optional. (BL 9.30.25)

Corrective Action Plan Summary

The Summary must provide:
Alternate Year Plan Updates
A. The Reason for the deficiency.
MADUA has struggled in the detection of overpayments realted to reallocation of resources to address high call volumes and continued "clean out" from the pandemic. Lack of call center staffing and resources has caused MADUA to reallocate adjudication staff to answer phones to address the high call volume. This has caused delays in adjudication of issues and has affected quality of deteminations. For overpayments associated with two party issues MADUA has struggled with receiving employer responses. These issues have affected MADUA's ability to adjudicate issues with all necessary information. MADUA has been working towards modernization having launched our revenue system and looking to launching our benefits system in May of 2025. Over the past year key benefit staff have been transferred to the project as SME and testers. Loss of these key staff to the modernization project has hindered MADUA's ability to detect overpayments.

Alternate Year Plan Updates

MADUA has struggled in the detection of overpayments due to the need to focus staff attention on Identity Verification investigation and cleanup of past ID Theft accounts. This has caused limitations on the number of staff focused solely on issues related to overpayment detection. Additionally, after the launch of MA DUAs modernized UI system, there were some processes that needed to be refined and a lot of cleanup of past, aging issues that had been converted to the new system. The need to adjust these new processes and focus on cleanup of past issues initially slowed the progress of working on new issues which could lead to overpayment detection. There was also a need at the launch of the new UI system to focus staff on resolving claimant and employer inquiries as they adjusted to the new system and new procedures. These needs to focus staff and attention elsewhere hindered MA DUAs ability to detect overpayments.

B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan.

Development of the modernized system will enhance MADUA's ability to investigate and detemine issues and detect overpayments. With this launch MADUA looks to better workflow and assign work with the goal of improving detection of overpayments. MADUA will review current business processes to make improvements to provide better support and training to staff so they may have confidence in their work. MADUA looks to develop new and additional training materials.

Alternate Year Plan Updates

MADUA's modernized UI system was launched in May 2025. With it, there has been less need for staff to manually review IDV issues and the processes for investigating and determining potential overpayments has been streamlined. This has allowed MA DUA to increase training across departments and allocate more staff to the investigation and detection of issues likely to lead to overpayments. Automation has increased the quality of cases created for review, making each case created more likely to lead to an overpayment. MA DUA has also focused on processes to increase the percentage of employer responses to fact finding in overpayment investigation cases, including enhanced messaging and the recent adoption of SIDES for employers and TPAs. MA DUA will continue to monitor its business processes to improve detection and ensure staff are properly trained to continue to improve the number of overpayments being detected and the speed at which they are being determined

C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful.
NA

Alternate Year Plan Updates

Previously existing problems in MA DUAs legacy system with identifying overpayments persisted in the first part of the past year, mainly high call volumes and ID Theft cleanup processes requiring reallocated staff to focus on those issues insread of overpayment detection issues. When MA DUAs modernized UI system was launched, there was a natural learning curve for staff and the need to fine tune some new processes before efficiency could be achieved with all issues, namely those involving overpayment detection. There was also a need at the launch of the new UI system to focus staff on resolving claimant and employer inquiries as they adjusted to the new system and new procedures. having to focus staff attention elsewhere slowed the effectiveness of the enchanched overpayment detection features.

D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals.
MADUA will work with unit supervisors and management to monitor training and support of staff as we establish better communication between departments.

Alternate Year Plan Updates

MADUA will work with unit supervisors and management to monitor training and support of staff to ensure a consistent process for all staff conducting investigations in an effort to detect and establish overpayments.

NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved.
(Enter Remaining Major Actions Here)

Milestones

	Completion Date
1. Development of additional training material and guidance regarding detection and investigation of potential overpayments.	12/31/2024
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): MADUA has continued to develop material and provide training as needed. Taining materials and training sessions related to improper payment and potential overpaid benefits are conducted with PI staff and PI communicates with all department to provide any updates related to investigation of potential overpayments and or establishments of debt. Materials have been developed for all departments while other trainings are specific to PI staff. MADUA works to update current materials related to changes in the IDV workflow and continue planning for future IDV workflow changes anticipated in January of 2025. Additionally, MADUA has begun training all staff on the modernized system in preparation for changes to current workflows and procedures. while developing new materials related to changes associated with modernization in May of 2025.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Milestone completed - Training associated with overpayment detection, investigation and collection was developed, conducted and completed by appropriate staff. Training included both phone staff and fraud investigators covering elements to PI and potential overpayment establishment an recoveries. Department supervisors continue to support staff in there daily work and continued training while working to develop updated training materials associated with the modernized system launch in May in 2025.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Milestone completed - Training associated with overpayment detection, investigation and collection was developed, conducted and completed by appropriate staff. Training included both phone staff and fraud investigators covering elements to PI and potential overpayment establishment an recoveries. Department supervisors continue to support staff in there daily work and continued training while working to develop updated training materials associated with the modernized system launch in May in 2025.	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2025): Milestone completed - Training associated with overpayment detection, investigation and collection was developed, conducted and completed by appropriate staff. Training included both phone staff and fraud investigators covering elements of PI and potential overpayment establishment and recoveries. Department supervisors continue to support staff in their daily work and continued training while working to develop updated training materials associated with the modernized system launch in May in 2025.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
2. Assess current call volume and phone system workflow and make improvements to reduce call volume allowing adjudication staff to focus on primary work task and not be reallocated to call center/phone work.	Completion Date 9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): MADUA had high call volumes throughout 2024. Throughout 2024, Program Integrity calls were mostly associated with ID theft claims and potential hacked accounts. Legitmate persons in need of UI were unable to file claim due to prior fraudulent claim activities while other claimants fell victims to fake UI website and phishing schemes having their legitimate UI claim compromised. Changes to business processes in 3rd QTR 2024 and subsequent updates in December of 2024 resolved calls associated with some of these fradulent activities. Review of prior claims denied claims allowed for MADUA to proactive address prior ID theft claims to allow for filing of new valid claims without additional delays.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Changes to business processes in 3rd QTR 2024 and subsequent updates in December of 2024 continue to control calls associated with some of these fradulent activities. Additional controls associated with the change of banking information continue to control account takeovers. Additional changes to the IDV workflow in January 2025 streamlined the initial ID verification allowing over 60% of all initial claims to receive an IDV determination within 72 hours of submitting their initial claim. This change also included a switch to using only an in-person option for ID proofing when secondary verification may be needed.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): The additional controls continue to be effective. When launching our modernized system in May of 2025 MADUA tighted the fraud score in anticipation of a spike in fraudulent claim activities. Although MADUA did see a spike in fraud activities in May of 2025, the fraud was detected and stopped due to the current IDV process and the additional controls that were added to detect fraud when we modernized.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	

The additional controls added to MADUAs modernized system continue to be effective. Subsequent spikes in fraud activities in July and August were detected and stopped due to the current identity verification process, allowing staff members to continue to focus on detecting and establishing overpayments, rather than addressing these fraudulent accounts.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

3. Research current population of overpaid accounts to determine issues types driving establishment of overpayments to better detect potential issues of overpayment.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): BAM case audits continue to show improper payments related to worksearch, benefit year earnings (BYE), and separations, which is consistent with many states across the region/country. MADUA improper payment rate are decreasing over the past 12 months. MADUA will continue current efforts to detect and reduce overpayments and looks for modernization to bring more effective processes for better detection to decrease establishment of overpayments moving forward. In November of 2024 MADUA implemented a "gap" solution for the NDNH/SDNH process. Developing this solution allowed the agency to review current selection parameters and make adjustments. MADUA hopes these changes and future improvements will impact overpayment detection and improper payment rates. Overpayments associated with identity verification continued to be a established throughout 2024 mostly related to MADUA's struggles with ID proofing. In March of 2024 MADUA implemented a new ID proofing solution providing online and in-person verification. MADUA found the online vendor's controls did not meet the needs of a high risk program. This led to improper payment of benefits related to identity verification. In December of 2024 changes in the IDV workflow improved MADUA's prevention of improper payments and additional changed planned for 1st QTR 2025 will further improve results.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): BAM case audits continue to show improper payments related to worksearch, benefit year earnings (BYE), and separations, which is consistent with many states across the region/country. However, ETA data for improper payments is not currently available for Q2 2025.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): BAM case audits continue to show improper payments related to worksearch, benefit year earnings (BYE), and separations, which is consistent with many states across the region/country. However, ETA data for improper payments is not currently available for Q3 2025.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): BAM case audits continue to show improper payments related to worksearch, benefit year earnings (BYE), and separations, which is consistent with many states across the region/country. However, ETA data for improper payments is not currently available for Q4 2025.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
4. Strengthen messaging to interested parties to increase quality of investigation and information being provided by claimants and employers.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): MADUA continues to enhance messaging to interested parties utilizing our state website (mass.gov) to communicate updates and provide additional avenues for users to contact us. Updates to online system messaging regarding any requirements associated with filing an initial claim, including identity verification, monetary, separation and other eligibility requirements. MADUA directors participate in an advisory council which includes advocates for claimant and employers. MADUA works closely with state career centers and other reemployment agencies to facilitate resolution of cases related to improper payments and other potential fraudulent activities. MADUA continues to strengthen communication internally and externally to provide accurate and updated information to any interested parties.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): MADUA continues to enhance messaging to interested parties utilizing our state website (mass.gov) to communicate updates and provide additional avenues for users to contact us. Updates to online system messaging regarding any requirements associated with filing an initial claim, including identity verification, monetary, separation and other eligibility requirements. Updated guidance was created and issued when we modernized in May of 2025. MADUA directors participate in an advisory council which includes advocates for claimant and employers.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): MADUA continues to enhance messaging to interested parties utilizing our state website (mass.gov) to communicate updates and provide additional avenues for users to contact us. Updates to online system messaging regarding any requirements associated with filing an initial claim, including identity verification, monetary, separation and other eligibility requirements. Updated guidance was created and issued when we modernized in May of 2025. MADUA directors participate in an advisory council which includes advocates for claimant and employers.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): MADUA continues to enhance messaging to interested parties utilizing our state website (mass.gov) to communicate updates and provide additional avenues for users to contact us. Updates to online system messaging regarding any requirements associated with filing an initial claim, including identity verification, monetary, separation and other eligibility requirements. Updated guidance was created and issued when we modernized in May of 2025. MADUA directors participate in an advisory council which includes advocates for claimant and employers and senior staff at MADUA meets often to discuss more effective ways to communicate with those parties as well. MADUA has also rolled out SIDES to all employers, in an effort to increase response rate among TPAs along with employers who use SIDES program.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
5. Enhancements in detection and investigation due to modernized system	Completion Date
	6/30/2025
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): MADUA will launch a modernized benefits system in May of 2025. With modernization will come multiple enhancements to processes used to detect improper payments. Current manual processes will be automated and better data analysis can be conducted with improvements to reports. Both these enhancements will streamline current unit processes used to detect improper payments. MADUA is current engaged in other projects which focus on earlier detection and prevention of improper payments. Better reporting will be provided to MADUA managers to review and analyze processes and implement changes as needed.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Milestone complete - Modernization occurred in May of 2025 offering more automated and streamlined processes - we will continue to monitor these detection methods in the new system and make adjustments as needed.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Milestone complete - Modernization occurred in May of 2025 offering more automated and streamlined processes - we will continue to monitor these detection methods in the new system and make adjustments as needed.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Milestone complete - Modernization occurred in May of 2025 offering more automated and streamlined processes - we will continue to monitor these detection methods in the new system and make adjustments as needed.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
6. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

7. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
8. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
9. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

Overpayments Recovery												
Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report					Back to Biennial Overview 2025				Back to Alternate Overview 2026			
State: Massachusetts					Federal Fiscal Year 2025				Federal Fiscal Year 2026			
Performance Measures	ALP	CAP Based on PIA Year 2023 07/01/2022 - 06/30/2023 Performance	CAP Based on PIA Year 2024 07/01/2023 - 06/30/2024 Performance	State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4
UI Overpayment Recovery Measure	≥ 68%	23.59%	19.54%	Target	43.00%	48.00%	52.00%	55.00%	54.00%	57.00%	60.00%	63.00%
				Actual	28.80%	32.81%	30.36%	39.13%				
Regional Office Comments in cell below:												
Performance Measures added for FY25 Q2: 32.81%; FY25 Q3: 30.36% https://oui.doleta.gov/unemploy/recovery/recovery_rpt.asp (BL 9.30.25)												
Corrective Action Plan Summary												
The Summary must provide: Alternate Year Plan Updates A. The Reason for the deficiency. MADUA has struggled with recovery of overpayments due to the amount of UI debt that has been and continues to be established related to ID theft and hacked accounts. For cases of ID theft and hacked payments MADUA does not hold the true claimant responsible to repay the debt as they are a victim. In cases of overpayment associated with fraudulent claims/ID theft, these overpayments are marked as "uncollectible" and are not recovered by the agency. Additionally, the current economic turn has caused many claimant's with UI debt to request waivers due to their inability to repay. Many are now unemployed and based on their financial circumstances the waiver are approved. MADUA also struggles with recovery associated with cases prosecuted by the OIG/AG and other agencies. MADUA has agreements with these agency which allows the agency to access UI records when cases of fraud are detected or reported to these agencies. The OIG/AG will often prosecute these cases outside of MADUA. These agencies often settle these cases for restitution or when tried and convicted have an order of restitution for MADUA. Often times these cases are prosecuting one person who has used multiple SSNs to file claims in Massachusetts. Due to this MADUA often cannot match up the restitution order with the UI account(s) from which the benefits were fraudulently paid. MADUA also struggles in cases of hacked accounts. In cases when a legit UI account is hacked and payments are diverted to a fraudulent banking account, MADUA reissues the payment(s) to the claimant's correct bank account and does not hold the, responsible to repay the payment issued to the hacker's bank account. Separate from our struggles associated with fraudulent claims and hacked UI accounts, MADUA does not have the administrative resources to place liens or garnishments associated with unpaid debt. The amount of time money and resources to keep up with these requests would require hiring additional staff. Additionally, having funds returned from financial institution related to fraudulent claims/ID theft is difficult. Banks rarely provide enough information for agency to match up the payments and payments are often partial returns. The agency also struggles with refunding funds to the proper UI accounts as the bank does not associate the return funds to the UI program from which benefits were paid.												
Alternate Year Plan Updates												
MADUA has continued to struggle with overpayment recovery due to the amount of debt that is due to ID Theft and therefore uncollectable, along with the waiver approval rate, due to multiple factors. All of those cases constitute established debt that MA DUA has not ability to collect on. We have also continued to receive restitution payments from the Treasury related to OIG investigations which has no claim details and the restitution therefore cannot be attributed to specific claims, or returned funds from financial institutions that do not have enough information included to be able to match those returns to specific claims. MA DUA also continues to struggle with staffing levels, which precludes the agency from taking a more proactive approach in seeking the return of funds, by activating a lien or wage garnishment process to recover debt.												
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. MADUA continues to assess current recovery activities. For tax year 2024, MADUA will be referring over 78,000 overpayment for state tax intercept and expect these repayments to impact the recovery rate in 1st and 2nd quarter on 2025. Last year (tax year 2023) MADUA was able to sent state tax intercept referrals by the end of January 2024 allow MADUA to collect on referrals through the entire tax refund season. This helped improve MADUA's recovery rate in 1st and 2nd quarter of 2024 increase recoveries to over 38% for both quarters. MADUA hope to see similar recoveries in 1st and 2nd quarter of 2025 related to state tax intercept which will help to meet our performance goals through FY2025. With the launch of our modernized system in May of 2025, MADUA looks to streamline processes and increase usability making it easier for claimant to repay their debt.												
Alternate Year Plan Updates												
Enhancements adopted in MADUA new modernized UI system to aid overpayment recovery efforts are frequently being monitored and updated to increase effectiveness. Those enhancements include making it easier for claimants to make repayments online or set up payment plans, increased notifications of debts owed or missed repayments and better recognition and reduction of debt accrued due to ID Theft, allowing recovery efforts to focus on legitimate debt. MA DUA expects to refer over 120,000 overpayments for state tax intercept, which will aid recovery efforts in the first and second quarters of 2026. Additionally, MA DUA is increasing its coordination with state and federal law enforcement partners to identify and attribute restitution payments coming from court decisions in stolen identity cases to the claims affected, allow for proper reporting of the recovery												
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful. MADUA continues to see an increase in the recovery rate; however MADUA is still recovering from the temporary regulations that were put in place during the pandemic to waiver eligible debt.												
Alternate Year Plan Updates												
MADUA continues to see an increase in the recovery rate, but continued to struggle with temporary waiver regulations previously adopted for pandemic debt along with overpayments attributed to ID Theft. Strategies adopted within the MA DUA modernized UI system to deal with those past issues were no instantly successful upon rollout of that system in May 2025 because MA DUA had to engage in a lot of cleanup of that past debt brought over in the conversion from prior UI systems to the enhanced one.												
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. MADUA will monitor recovery activities and looks to continue to improve our recovery rate as we move toward modernization in May of 2025. MADUA looks to successfully implement enhancements in the modernized system and then will monitor workflow related to enhancements												
Alternate Year Plan Updates												
MA DUA will continue to monitor recovery rates to see if the expected uptick occurs based on the enhancements that have been put in place and will adjust strategies in areas where recovery rate can be increased. If performance goals are met, MA DUA will continue to monitor repayment activity and seek additional system enhancements to continue to increase recovery rate beyond the levels currently being sought												
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved.												
(Enter Remaining Major Actions Here)												
Milestones												
1. Meet quarterly with MADUA leadership to discuss recovery efforts and how to improve efforts.												Completion Date
												9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): MADUA leadership continues to meet to discuss recovery efforts. The agency looks for improvements in 1st QTR 2025 as recoveries associated with state and federal tax intercepts will begin to be reflected. Our modernization in May of 2025 will include enhancements debt collections procedures which will encourage repayment of benefit debt and provide additional repayment methods to claimant's looking to resolve their debt. Modernization will also offer improvements that ease the agency's ability to establish overpayments associated with ID theft cases and other agencies referrals. Modernization will allow for better workflows to track cases and apply restitution associated with civil and criminal prosecutions, which will improve efforts to make recoveries.												
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): MADUA leadership continues to meet to discuss recovery efforts. The agency looks for improvements in 2nd QTR 2025 as recoveries associated with state and federal tax intercepts will begin to be reflected. Our modernization in May of 2025 will include enhancements debt collections procedures which will encourage repayment of benefit debt and provide additional repayment methods to claimant's looking to resolve their debt. Modernization will also offer improvements that ease the agency's ability to establish overpayments associated with ID theft cases and other agencies referrals. Modernization will allow for better workflows to track cases and apply restitution associated with civil and criminal prosecutions, which will improve efforts to make recoveries.												
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): MADUA leadership continues to meet to discuss recovery efforts. Since MADUA refocus on benefit year earnings, more overpayments are being detected. MADUA hopes to refer more cases to the AG moving forward.												
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): MADUA leadership continues to meet to discuss recovery efforts. MADUA has assigned more staff to focus on benefit year earnings issues to detect overpayments and through modernization of the payment plan setup process for claimants and monthly statement of account letters, hopes to see an uptick in repayments being made. MADUA also continues to work on identifying more cases for referral to the AG.												
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):												
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):												
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):												
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):												
2. Business process review to identify inefficiencies and make recommendations for enhancements.												Completion Date
												9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): MADUA continues to review our improper payment detection processes. In 2nd QTR of 2024 an adjudication team was reestablished to focus on benefit year earnings. This team worked and reduced the backlog by over 98% with no pending investigations over one year. In November of 2024, MADUA updated its NDNH/SDNH process to prepare for modernization. PI supervisors and management worked with the development team to implement the process. This process was reviewed and adjusted the parameters for case selection. Modernization will also offer improvements that ease MADUA's ability to establish overpayments and apply repayments when the debt is associated with ID theft or other fraudulent claim activities. In additional automated workflows and better data analysis will streamline current antiqued process.												
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): MADUA continues to review our improper payment detection processes. In 2nd QTR of 2024 an adjudication team was reestablished to focus on benefit year earnings. This team worked and reduced the backlog by over 98% with no pending investigations over one year. In November of 2024, MADUA updated its NDNH/SDNH process to prepare for modernization. PI supervisors and management worked with the development team to implement the process. This process was reviewed and adjusted the parameters for case selection. Modernization will also offer improvements that ease MADUA's ability to establish overpayments and apply repayments when the debt is associated with ID theft or other fraudulent claim activities. In additional automated workflows and better data analysis will streamline current antiqued process.												
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):												

MADUA continues to review our improper payment detection processes. In 2nd QTR of 2024 an adjudication team was reestablished to focus on benefit year earnings. This team worked and reduced the backlog by over 98% with no pending investigations over one year. In Novemeber of 2024, MADUA updated its NDNH/SDNH process to prepare for modernization. PI supervisors and management worked with the development team to implement the process. This process was reviewed and adjusted the parameters for case selection. Modernization will also offer improvements that ease MADUA's ability to establish overpayments and apply repayments when the debt is associated with ID theft or other fraudulent claim activities. In additional automated workflows and better data analysis will streamline current antiquated process.
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): MADUA continues to review our improper payment detection processes. In 2nd QTR of 2024 an adjudication team was reestablished to focus on benefit year earnings. This team worked and reduced the backlog by over 98% with no pending investigations over one year. In Novemeber of 2024, MADUA updated its NDNH/SDNH process to prepare for modernization. PI supervisors and management worked with the development team to implement the process. This process was reviewed and adjusted the parameters for case selection. Modernization will also offer improvements that ease MADUA's ability to establish overpayments and apply repayments when the debt is associated with ID theft or other fraudulent claim activities. In additional automated workflows and better data analysis will streamline current antiquated process.
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):

3. Develop training and IT requirements.		Completion Date
		9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): MADUA continues to prepare for the launch of our modernized benefit system in May of 2025. MADUA continues to work with system developers to finalize PI/Integrity processes in the new system and develop associated training to prepare staff and supervisors for working in the new system. In November 2024, MADUA implemented a gap solution for the NDNH/SDNH process and begin working on the finalized solution for the new system. As part of this solution MADUA also developed a new data transfer to the IDH. MADUA continues to move towards adding the employer integrity hub once our modernized system has launched and new business process have stabilized. MADUA conducted analysis of the population to be referred for state tax intercept to confirm accuracy of the population and confirm business process for the new system.		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): MADUA continues to prepare for the launch of our modernized benefit system in May of 2025. MADUA continues to work with system developers to finalize PI/Integrity processes in the new system and develop associated training to prepare staff and supervisors for working in the new system. In November 2024, MADUA implemented a gap solution for the NDNH/SDNH process and begin working on the finalized solution for the new system. As part of this solution MADUA also developed a new data transfer to the IDH. MADUA continues to move towards adding the employer integrity hub once our modernized system has launched and new business process have stabilized. MADUA conducted analysis of the population to be referred for state tax intercept to confirm accuracy of the population and confirm business process for the new system.		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): MADUA continues to prepare for the launch of our modernized benefit system in May of 2025. MADUA continues to work with system developers to finalize PI/Integrity processes in the new system and develop associated training to prepare staff and supervisors for working in the new system. In November 2024, MADUA implemented a gap solution for the NDNH/SDNH process and begin working on the finalized solution for the new system. As part of this solution MADUA also developed a new data transfer to the IDH. MADUA continues to move towards adding the employer integrity hub once our modernized system has launched and new business process have stabilized. MADUA conducted analysis of the population to be referred for state tax intercept to confirm accuracy of the population and confirm business process for the new system.		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): MADUA launched our modernized unemployment system in May 2025. All staff received dedicated training related to the new processes involed in identifying, establishing and recovering overpayments before and after rollout. Supervisors continue to meet with staff and provide periodic training on these procedures as we move forward in the new system. We also continue to meet with our developers to fine tune our NDNH/SDNH and quarterly wage parameters to better identify cases that will lead to improper payments, as well as adding more staff to review earnings issues to identify and establish overpayments due to benefit year earnings.		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		
4. Test, enhance, implement IT solutions and train staff on new business procedures.		Completion Date
		9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): In 4th QTR 2024, MADUA implemented a new process for our NDNH/SDNH selection process. MADUA's contract with the vendor overseeing this process in our current online system was expiring in November of 2024. As a partial year contract was not an option, and the NDNH/SDNH process has been redesigned for our modernized system MADUA had to develop a process to bridge the gap between the end of the prior contract and launch of our modernized system in May on 2024. With the upcoming modernization the agency's focus has been split between regular day-to-day UI operations and tasks related to final implementation of our new online system. With less than 6 months until launch resources from all departments, including fraud investigations and benefit collections, have been reallocated to support the modernization having to conduct system testing associated with their business process areas. Management and Program Integrity continue to finalize training for business areas and coordinate schedules to prepare staff and supervisors.		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): In 4th QTR 2024, MADUA implemented a new process for our NDNH/SDNH selection process. MADUA's contract with the vendor overseeing this process in our current online system was expiring in November of 2024. As a partial year contract was not an option, and the NDNH/SDNH process has been redesigned for our modernized system MADUA had to develop a process to bridge the gap between the end of the prior contract and launch of our modernized system in May on 2024. With the upcoming modernization the agency's focus has been split between regular day-to-day UI operations and tasks related to final implementation of our new online system. With less than 6 months until launch resources from all departments, including fraud investigations and benefit collections, have been reallocated to support the modernization having to conduct system testing associated with their business process areas. Management and Program Integrity continue to finalize training for business areas and coordinate schedules to prepare staff and supervisors.		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Management and Program Integrity continue to work to update trainings for business areas and coordinate schedules to prepare staff and supervisors.		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Management and Program Integrity continue to work to update trainings for business areas and coordinate schedules to prepare staff and supervisors. We also continue to work with our developers to enhance our detection and adjudication processes as we move forward in our new system.		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		
5. Senior staff will meet quarterly to receive update on progress and identify barriers.		Completion Date
		9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): MADUA senior staff meets to discuss any needed updates and discuss progress on any developments related to the program and overpayment recoveries. Senior staff collaborates and works with their teams to identify any barriers and develop solutions. With modernization in May of 2025, focus has been diverted from day-to-day UI operations to address needs related to final implementation of our new online system. With less than 6 months until launch of our new benefits system, MADUA senior staff and management receive updates associated with final development, end-to-end testing, and staff training. Management has participated finalizing training and coordinated staff training and coverage. Preparation of launch continue as does planning for after launch enhancements which will be needed once the new business processes have stabilized.		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): MADUA senior staff meets to discuss any needed updates and discuss progress on any developments related to the program and overpayment recoveries. Senior staff collaborates and works with their teams to identify any barriers and develop solutions. With modernization in May of 2025, focus has been diverted from day-to-day UI operations to address needs related to final implementation of our new online system. With less than 6 months until launch of our new benefits system, MADUA senior staff and management receive updates associated with final development, end-to-end testing, and staff training. Management has participated finalizing training and coordinated staff training and coverage. Preparation of launch continue as does planning for after launch enhancements which will be needed once the new business processes have stabilized.		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): MADUA senior staff meets to discuss any needed updates and discuss progress on any developments related to the program and overpayment recoveries. Senior staff collaborates and works with their teams to identify any barriers and develop solutions. With the launch of the modernized system in May of 2025, MADUA works to identify any problem or issues within the new system.		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): MADUA senior staff meets to discuss any needed updates and discuss progress on any developments related to the program and overpayment recoveries. Senior staff collaborates and works with their teams to identify any barriers and develop solutions. Since the launch of the modernized system in May of 2025, MADUA has continued to work to identify any problems or issues within the new system and find resolutions to increase issue identification and staff productivity.		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		
6. MADUA expects to refer over 120,000 overpayments for state tax intercept during first quarter of 2026		Completion Date
		9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): N/A		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): N/A		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): N/A		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): N/A		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		

7. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
8. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
9. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

Benefits Data Validation													
Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report						Back to Biennial Overview 2025				Back to Alternate Overview 2026			
State: Massachusetts						Federal Fiscal Year 2025				Federal Fiscal Year 2026			
Performance Measures	ALP	CAP Based on Validation Year 2024 4/1/2023- 3/31/2024 Performance	CAP Based on Validation Year 2025 4/1/2024- 3/31/2025 Performance	State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4	
Data Validation Benefits - All Submitted and Passing	Submitted & Passing	Population 1	Population 1	Target	X	X	N/S	X	X	PASS	PASS	X	
		Failed	Not Submitted	Actual	X	X	N/S	X					
		Population 3	Population 3	Target	X	X	N/S	X	X	PASS	PASS		X
		Failed	Not Submitted	Actual	X	X	N/S	X					
		Population 3a	Population 3a	Target	X	X	N/S	X	X	PASS	PASS		X
		Not Submitted	Not Submitted	Actual	X	X	N/S	X					
		Population 4	Population 4	Target	X	X	N/S	X	X	PASS	PASS		X
		Failed	Not Submitted	Actual	X	X	N/S	X					
		Population 8	Population 8	Target	X	X	N/S	X	X	PASS	PASS		X
		Failed	Not Submitted	Actual	X	X	N/S	X					
		Population 9	Population 9	Target	X	X	N/S	X	X	PASS	PASS		X
		Failed	Not Submitted	Actual	X	X	N/S	X					
		Population 10	Population 10	Target	X	X	N/S	X	X	PASS	PASS		X
		Failed	Not Submitted	Actual	X	X	N/S	X					
		Population 11	Population 11	Target	X	X	N/S	X	X	PASS	PASS		X
		Failed	Not Submitted	Actual	X	X	N/S	PASS					
		Population 12	Population 12	Target	X	X	N/S	X	X	PASS	PASS		X
		Failed	Not Submitted	Actual	X	X	N/S	X					
		Population 13	Population 13	Target	X	X	N/S	X	X	PASS	PASS		X
		Failed	Not Submitted	Actual	X	X	N/S	X					
		Population 14	Population 14	Target	X	X	N/S	X	X	PASS	PASS		X
		Failed	Not Submitted	Actual	X	X	N/S	X					
		Population 15	Population 15	Target	X	X	N/S	X	X	PASS	PASS		X
		Failed	Not Submitted	Actual	X	X	N/S	X					
		Mod 4 Seps	Mod 4 Seps	Target	X	X	N/S	X	X	PASS	PASS		X
		Not Submitted	Not Submitted	Actual	X	X	N/S	X					
		Mod 4 Nonseps	Mod 4 Nonseps	Target	X	X	N/S	X	X	PASS	PASS		X
		Not Submitted	Not Submitted	Actual	X	X	N/S	X					
Mod 4 Appeals	Mod 4 Appeals	Target	X	X	N/S	X	X	PASS	PASS		X		
Not Submitted	Not Submitted	Actual	X	X	N/S	X							
Regional Office Comments in cell below:													
Corrective Action Plan Summary													
The Summary must provide: Alternate Year Plan Updates A. The Reason for the deficiency. The failure of The Massachusetts Benefit Data Validation program is directly related to the failed modernized UI Online system. That system delivered failed to utilize established federal definitions and guidance. Post modernization, Massachusetts implemented a Data Warehouse. Data was moved from UIO to the Warehouse and reporting was moved from UIO to the Data Warehouse allowing for additional errors. Significant time and analysis have validated that the BDV program operates correctly with correct universe and sampling pulls. MDUA endeavored to remedy this problem through extensive analysis of data and specifications of the data stored in the System and the Data Warehouse. After countless hours and dollars having been devoted to fixing defects and adding enhancements to both the Data Warehouse and UIOnline, it came to the point where millions of dollars would need to be spent to fix the framework to allow it to meet USDOL standards and definitions. After fixing all defects possible, there remained over 100 defects directly related to the programming of the system framework. Once Massachusetts determined that it would invest in a new unemployment system, it was decided that the defects necessary to meet BDV standards would not be worth the return on investment. Prior to Covid, funding had been approved for the new system and the work had begun to the point of hiring vendors. Once the pandemic hit, the development of the new system was delayed to dedicate all resources to pandemic relief, therefore delaying implementation of a new system.													
Alternate Year Plan Updates There was no change in cause of failure from prior year. The failure of UI Online system to be adequate programmed to correctly identify data elements to federal definition prevented MDUA from passing without major system change.													
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. The development of Benefit Data Validation within the EMT program has begun. The current staff responsible for implementation of BDV has been working with the vendor and SWA project staff to define populations and data. Module 3 will be developed prior to moving to the testing face. Module 3 will be used for test scenarios for testing prior to go-live. Additionally, BDV will be utilized to test the accuracy of all UIRR prior to go-live. Validations for BDV populations will be built into the EMT system to validate every population once it is generated. These validations will notify the user of any duplicates, anomalies, or outliers/rogue data. EMT will allow the Validator to drill down into the sample and population to analyze data to ensure accuracy of the populations prior to entry into the SUN. EMT go-live is scheduled for May 12, 2025.													
Alternate Year Plan Updates BDV was built into the new EMT system that went live in May 2025. BDV is implementing all populations in order to validate RV and UIRs as well as every data element.													
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful. Initial plans for a new system were in progress but stalled due to actions necessary to assist claimants and employers through the pandemic. Development of the new system resumed; however, tax functionality was developed prior to benefit functionality. This new system, Employment Modernization and Transformation (EMT) is being developed with strict adherence to federal definitions provided in the ETA 401 and other handbooks. EMT will incorporate the Benefit Data Validation program into the framework. This will allow testing of the system through BDV testing to ensure federal compliance is met.													
Alternate Year Plan Updates After significant analysis, it was known that UIO system programming incorrect to a level that the agency would never be able to pass BDV. This was part of the impetus that that led to the SWA engaging in a new modernization project. MDUA engaged FAST to implement a COTS system that was shown to be able to pass BDV in other states. While there is customization, the company had demonstrated a system that could meet federal BDV requirements.													
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. Monitoring of Benefit Data Validation will occur through implementation of the program. A plan has been established for post go-live to ensure any changes to UI program and/or UIRR data are aligned with BDV, ensuring synchronicity. EMT is being built to allow front end users to view population and report data. This will allow the BDV staff to analyze and validate data without relying on technology staff to produce information for analysis.													
Alternate Year Plan Updates BDV is implementing all populations in order to validate RV and UIRs as well as every data element. An online methodology is in place to work with a system business unit to address needed change or anomalies seen within RV and DEV. Communication on status of problems and worked being performed is electronically communicated via system as well as allowing users to monitor the change status electronically.													
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved. (Enter Remaining Major Actions Here)													

Milestones	
1. Work with vendor and SWA project staff to complete development of BDV populations, Mod 3, and Mod 4.	Completion Date
	6/30/2025
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): Benefit Data Validation continues to be developed between the SWA and FAST team. ETA has been of assistance offering guidance when requested to ensure accuracy of populations. It is expected that development will be complete and the first set of universes and populations will be run after the end of the 2nd quarter of the 2025 calendar year.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Benefit Data Validation continues to be developed between the SWA and FAST team. ETA has been of assistance offering guidance when requested to ensure accuracy of populations. It is expected that development will be complete and the first set of universes and populations will be run after the end of the 2nd quarter of the 2025 calendar year.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Development is complete. BDV populations were generated from the new EMT system for quarter ending June 2025.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Development is complete. BDV populations are being generated from the new EMT system.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
2. Test all BDV populations, Mod 3, and Mod 4 for accuracy of both BDV populations and UI system through implementation of the BDV program in EMT.	Completion Date
	6/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): The SWA understands that all BDV populations must be completed by the June 10 2026 due date. While tested prior to go-live of the modernized system; the SWA will use implementation of the BDV program to validate accuracy of BDV universes, populations, and reporting. To ensure completion of this goal; the responsible unit will utilize the existing BDV supervisor to implement the program while assigning an additional supervisor, experienced and with extensive business knowledge, to implement and test the program. Generation of the universes and samples will occur in July 2025 for calendar quarter Q2 2025. This milestone's completion date has been moved out extensively to reflect the deadline of the completion of all testing. It is expected that quarterly CAP updates will provide testing outcomes of specific populations.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): The SWA understands that all BDV populations must be completed by the June 10 2026 due date. While tested prior to go-live of the modernized system; the SWA will use implementation of the BDV program to validate accuracy of BDV universes, populations, and reporting. To ensure completion of this goal; the responsible unit will utilize the existing BDV supervisor to implement the program while assigning an additional supervisor, experienced and with extensive business knowledge, to implement and test the program. Generation of the universes and samples will occur in July 2025 for calendar quarter Q2 2025. This milestone's completion date has been moved out extensively to reflect the deadline of the completion of all testing. It is expected that quarterly CAP updates will provide testing outcomes of specific populations.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): Two UI Performs staff will be assigned to test and implement BDV for the 2026 BDV year. One is currently engaged in implementation of BTQ while the other remains on the modernization project. Both staff will attend DV training in July of 2025 and begin	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Q4 2025 will be the first quarter that BDV populations are generated from the modernized EMT system. DV staff have begun to work on populations that use monthly data. Populations 6, 7, and 11 have passed data validation. BDV testing will continue with populations testing quarterly data.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
3. Report defects and retest in conjunction with vendor and SWA project staff to ensure accuracy of both BDV populations and UI system.	Completion Date
	6/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): The SWA understands that all BDV populations must be completed by the June 10 2026 due date. While tested prior to go-live of the modernized system; the SWA will use implementation of the BDV program to validate accuracy of BDV universes, populations, and reporting. To ensure completion of this goal; the responsible unit will utilize the existing BDV supervisor to implement the program while assigning an additional supervisor, experienced and with extensive business knowledge, to implement and test the program. Generation of the universes and samples will occur in July 2025 for calendar quarter Q2 2025. This milestone's completion date has been moved out extensively to reflect the deadline of the completion of all testing. It is expected that quarterly CAP updates will provide testing outcomes of specific populations.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): The SWA understands that all BDV populations must be completed by the June 10 2026 due date. While tested prior to go-live of the modernized system; the SWA will use implementation of the BDV program to validate accuracy of BDV universes, populations, and reporting. To ensure completion of this goal; the responsible unit will utilize the existing BDV supervisor to implement the program while assigning an additional supervisor, experienced and with extensive business knowledge, to implement and test the program. Generation of the universes and samples will occur in July 2025 for calendar quarter Q2 2025. This milestone's completion date has been moved out extensively to reflect the deadline of the completion of all testing. It is expected that quarterly CAP updates will provide testing outcomes of specific populations.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): This milestone will begin being worked in August 2025.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): DV staff began testing of benefit populations. Any enhancements for Populations 6 and 7 have been completed leading to the populations passing. There are errors in the EMT system that are preventing staff for executing the file for population 10. The vendor is currently working on fixing this file. Testing will resume after defect fix.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
4. Test BDV report validation data of all populations in conjunction to ensure accuracy of both BDV populations and UI system.	Completion Date
	6/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): The SWA understands that all BDV populations must be completed by the June 10 2026 due date. While tested prior to go-live of the modernized system; the SWA will use implementation of the BDV program to validate accuracy of BDV universes, populations, and reporting. To ensure completion of this goal; the responsible unit will utilize the existing BDV supervisor to implement the program while assigning an additional supervisor, experienced and with extensive business knowledge, to implement and test the program. Generation of the universes and samples will occur in July 2025 for calendar quarter Q2 2025. This milestone's completion date has been moved out extensively to reflect the deadline of the completion of all testing. It is expected that quarterly CAP updates will provide testing outcomes of specific populations.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): The SWA understands that all BDV populations must be completed by the June 10 2026 due date. While tested prior to go-live of the modernized system; the SWA will use implementation of the BDV program to validate accuracy of BDV universes, populations, and reporting. To ensure completion of this goal; the responsible unit will utilize the existing BDV supervisor to implement the program while assigning an additional supervisor, experienced and with extensive business knowledge, to implement and test the program. Generation of the universes and samples will occur in July 2025 for calendar quarter Q2 2025. This milestone's completion date has been moved out extensively to reflect the deadline of the completion of all testing. It is expected that quarterly CAP updates will provide testing outcomes of specific populations.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): This milestone will begin being worked in August 2025.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Testing has begun with populations 6 and 7 passing. Testing continues, but MDUA is experiencing difficulties due to UIRs that have been submitted are not population on ETA's side. MDUA continues to work with ETA to monitor submitted reports that are not populated. When populating UIRs with population universes; the report validation is failing as the comparison of previously submitted reports shows all zeroes, as if MDUA had not submitted said reports.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

5. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
6. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
7. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

Tax Data Validation												
Federal Fiscal Year: 2025-2026 SQSP Corrective Action Plan & Progress Report					Back to Biennial Overview 2025				Back to Alternate Overview 2026			
State: Massachusetts					Federal Fiscal Year 2025				Federal Fiscal Year 2026			
Performance Measures	ALP	CAP Based on Validation Year 2024 4/1/2023 - 3/31/2024 Performance	CAP Based on Validation Year 2025 4/1/2024 - 3/31/2025 Performance	State's Target/Actual Performance	12/31/2024 Quarter 1	3/31/2025 Quarter 2	6/30/2025 Quarter 3	9/30/2025 Quarter 4	12/31/2025 Quarter 1	3/31/2026 Quarter 2	6/30/2026 Quarter 3	9/30/2026 Quarter 4
Data Validation Tax - All Submitted and Passing	Submitted & Passing	Mod 5 Wage Item	Mod 5 Wage Item Failed	Target Actual					X	X	PASS	X
Regional Office Comments in cell below:												
Corrective Action Plan Summary												
The Summary must provide: Alternate Year Plan Updates A. The Reason for the deficiency. The TDV Pop 3 failure was due to technical issue with generation of the population; Defects were found with the files in the new system including: 1. the file was including ceased accounts 2. not subject accounts 3. in cases where multiple status determinations were issued on the same day, the file resulted in an error instead of using the most recent determination. The TPS/TDV coordinator worked closely with the COTS developer and this has all been fixed as of September 2024. Alternate Year Plan Updates While reviewing Module 5, an issue was discovered where Revenue auditors completed their wage audit and left duplicate records for the same employee: one with an SSN and another with an ITIN. This is causing a failure with TDV-Module 5 Wage Item validation when ITIN is corrected with SSN. B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. The TPS/TDV coordinator worked closely with the COTS developer to define the business rules related to Pop 3. The TPS/TDV coordinator tested the updates and we expect for this file to pass in 2024 Q4. Alternate Year Plan Updates To address this issue we plan to address this via short term and long term approaches. In the short term, we will identify and correct any existing duplicates and enhance quality control procedures for the auditors and audit supervisor to include a check for duplicate records prior to completing an audit. We will also explore the possibility for a long-term, system-based solution with the COTS developer to automatically correct or at least flag potential duplicate records for review. C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful. Alternate Year Plan Updates The plan in place last year was for a different issue identified with the generation of TDV Pop 3. This issue has been resolved. The plan in place this year is to address a different, unrelated issue with Module 5. D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. This issue has been resolved. MA DUA and the TPS/TDV coordinator are focused on monitoring the file to ensure no additional defects occur. Any additional findings will be documented using the COTS developer's project management tool and prioritized for work by the Revenue Alternate Year Plan Updates Enhanced quality control checks will be reviewed to confirm that duplicate record checks are being consistently performed and documented prior to closing an audit. Enhanced quality check procedures for the supervisor will be implemented to validate staff adherence to this new quality check. If a technical solution is implemented, it's effectiveness will be assessed and monitored by periodic system-wide checks that duplicate records are prevented or flagged as intended. NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved. (Enter Remaining Major Actions Here)												
Milestones												
1. Work with MATPS/DV coordinator to identify solutions for the Pop 3 file and implement fixes in UI system.										Completion Date		
										6/30/2025		
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): As part of a major system update called ServicePack, fixes were implemented to exclude from the DV file ceased and non-subject employers that were previously suspended. The implementation was done before closing of Q4-2024 and accurate file was generated for Q4-2024. Technical changes were also implemented to resolve the issue where multiple status determinations were done in the same day. TDV Pop 3 now includes only the last determination on an account. Sampling of TDV is now being completed on correct sampling. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): Defect related to Pop 3 was fixed. The fix for this issue went live with rollout two of the COTS system. This functionality was confirmed and results transmitted in May 2025. FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): This milestone has been completed as of May 2025. FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): This milestone has been completed as of May 2025. FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):												

2. Continue monitoring pop 3 file and document any new defects for solution.	Completion Date
	6/30/2025
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): MA DUA continues to upload TDV Pop 3 and validate Report Count and Minimum Sample every quarter. MA TPS/TDV coordinator works closely with DUA Revenue Operation Manager to make sure that the corrections made on the data validation file were also applied to the ETA 581 report. Also, MADUA continues to implement strategies to improve the Percentage of 90 Day New Employer Determinations to meet the GRPA Core Measure for Tax Timeliness. FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): MA DUA continues to monitor this function. This function passed when reviewed for validation year 2025 and is sampled every year. FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): This milestone has been completed as of June 10, 2025. However, we expect a new CAP for the status determination timeliness which we continue to work on. FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): All TDV populations have passed for 2025 year. Monitoring will continue. FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
3. Conduct a review of affected records to identify and resolve existing duplicates.	Completion Date
	6/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
4. Enhance quality control procedures within the Revenue Audit unit to include a check for duplicate records and monitor for adherence to this quality control.	Completion Date
	6/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
5. Work with COTS developer to assess potential for a systems based solution to prevent or automatically flag duplicate records.	Completion Date
	9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025): FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026): FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026): FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

6. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
7. (Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	
2. Develop and Test BAM Performance Metric Tools for Investigators and supervisors in the modernized UI system, EMT.	
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):	
The BAM Case Management system has been built. The BAM Supervisor continues to work full-time with FAST to customize and test the system. Testing of Performance Metrics has not begun.	
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):	
The BAM Supervisor has been assigned to work on EMT and development of the UI Performs audit programs. The system contains performance metrics for eas of management. However, this information will only be obtainable for batches starting 202519 and forward; there will be no historical data in the system. Count and percent of cases completed for each batch is searchable for 60 and 90 day time limits. There are links within timeliness that take the user to the actual sample to view incomplete cases and individual case information. Longitudianl timeliness for BAM year is displayed. The system details all four case types with individual counts of assignment and completion, then produces projectionss for case completion for the year. We are working with the vendor to determine if we are able to add comparison data values as the SWA must manually calculate these, the comparison data from SUN is not a link shared with the SWA.	
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):	
Management is in the process of learning the performance tools developed in EMT. The system has the ability to project and track number of cases sampled in comparison to minimum required samples. Individual weekly samples are montioired for completion of all investigations. Timeliness is calculated specific to each batch for 60 and 90 days. Because these performance tools are at the unit level, investigators contnue to be provided individual bi-weekly timeliness reports and reports of cases closed through query of the SUN system.	
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):	
BAM tools for tracking case completion and timeliness have been fully developed and implemented.	
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):	
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):	
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):	
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):	

Completion Date
12/31/2025

3.	Perform analysis of BAM universe and population data to ensure populations and reports are accurate and comparison data remains within established variance limits with ET reports.	Completion Date
		9/30/2025
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024): The BAM Case Management system has been built. The BAM Supervisor continues to work full-time with FAST to customize and test the system. Testing of population data is in progress.		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025): When viewing comparison data on a quarterly basis, the percentage is within allowable variance. The listed 15.5% is calculated based on the year of data. Massachusetts is expected to remain within normal limits as the increase was related to a problem that only occurs when there are additional benefit programs in place. This programming error has addressed in development of the new EMT unemployment system. Testing shows that the variance is within normal limits. The SWA will continue to monitor comparison data of all populations post go-live to ensure compliance.		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025): The comparison data is not available. MDUA continues to submit UIR reports that are not being picked up by ETA. Although appropriate reports were submitted, comparison data states that there is no universe which to compare the BAM universe data to.		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025): Analysis of BAM universe and population has occurred. A defect related to program types included in the sample has been fixed. Massachusetts allows a partial UI week to be supplemented by RED (additional weeks for school/training attendance) benefits. These combined payments were initially included in the universe for paid claims. Due to the government shutdown, we cannot obtain comparison data to determine outcomes.		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		
4.	DCA Monetary sampling selection will meet minimum required standards.	Completion Date
		9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		
5.	DCA Non-Monetary sampling selection will meet minimum required standards.	Completion Date
		9/30/2026
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		
6.	(Enter next milestone here)	Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		

7. (Enter next milestone here)		Completion Date
FY 2025 Quarter 1 Status Report (Quarter Ending 12/31/2024):		
FY 2025 Quarter 2 Status Report (Quarter Ending 3/31/2025):		
FY 2025 Quarter 3 status report (Quarter Ending 6/30/2025):		
FY 2025 Quarter 4 Status Report (Quarter Ending 9/30/2025):		
FY 2026 Quarter 1 Status Report (Quarter Ending 12/31/2025):		
FY 2026 Quarter 2 Status Report (Quarter Ending 3/31/2026):		
FY 2026 Quarter 3 Status Report (Quarter Ending 6/30/2026):		
FY 2026 Quarter 4 Status Report (Quarter Ending 9/30/2026):		

2026 January 7

1. This week Current Major Projects:
 - a. Reference checks for new hires.
2. Progress / Updates this week: None
3. Backlogs from last week / Issues / Delays: None
4. Risks or Concerns: None
5. Items Needing PM Support: None

2025 December 31

1. This week Current Major Projects:
 - a. Work on updates to BAM State Operational Handbook
 - b. Validation of BAM 2025 PIIA year data for ETA
2. Progress / Updates this week: None
3. Backlogs from last week / Issues / Delays: None
4. Risks or Concerns: None
5. Items Needing PM Support: None



MAURA HEALEY
GOVERNOR
KIM DRISCOLL
LIEUTENANT GOVERNOR

THE COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF LABOR AND WORKFORCE DEVELOPMENT
DEPARTMENT OF UNEMPLOYMENT ASSISTANCE

LAUREN E. JONES
SECRETARY
KATIE DISHNICA
DIRECTOR

October 11, 2023

Gregg H. Weltz
Regional Administrator
U.S. Department of Labor/ETA
25 New Sudbury St
Room E-350
Boston, MA 02203

Dear Mr. Gregg Weltz,

Enclosed is the Massachusetts Department of Unemployment Assistance State Quality Service Plan (SQSP) for Fiscal Year 2024. Massachusetts is submitting the alternate year plan for your review and approval. This package transmits the following items:

- FY 2024, State Plan Narrative, including Assurances
- SQSP FY 2024 Correction Action Plan Workbook
- FY 2024 Integrity Action Plan
- SF 424 – Application for Federal Assistance (by Oct 11, 2023)
- SF 424B - Assurances
- Organizational Charts

All items have been prepared in accordance with the instructions in Employment and Training Handbook No. 336, 18th Edition, Change 4, and the UI Program Letter No 09-23 issued on June 30, 2023, initiating the FY 2024 SQSP process.

If you have any questions concerning the SQSP, please contact me at (617) 626-5132.

Sincerely,

Katie Dishnica, Director
Massachusetts Department of Unemployment Assistance

100 CAMBRIDGE STREET • SUITE 400 • BOSTON, MA 02114
www.mass.gov/dua

Attachment H2
Budget Worksheets/Forms

View Burden Statement

OMB Number: 4040-0007
Expiration Date: 02/28/2025**ASSURANCES - NON-CONSTRUCTION PROGRAMS**

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington, DC 20503.

PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.

NOTE: Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

1. Has the legal authority to apply for Federal assistance and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States and, if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee-3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and, (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.
7. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally-assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
8. Will comply, as applicable, with provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

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Prescribed by OMB Circular A-102

9. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§327-333), regarding labor standards for federally-assisted construction subagreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93-205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §§469a-1 et seq.).
14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. §§2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§4801 et seq.) which prohibits the use of lead-based paint in construction or rehabilitation of residence structures.
17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations, and policies governing this program.
19. Will comply with the requirements of Section 106(g) of the Trafficking Victims Protection Act (TVPA) of 2000, as amended (22 U.S.C. 7104) which prohibits grant award recipients or a sub-recipient from (1) Engaging in severe forms of trafficking in persons during the period of time that the award is in effect (2) Procuring a commercial sex act during the period of time that the award is in effect or (3) Using forced labor in the performance of the award or subawards under the award.

SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL	TITLE
	Director
APPLICANT ORGANIZATION	DATE SUBMITTED
Department of Unemployment Assistance	10/03/2023

Standard Form 424B (Rev. 7-97) Back



WORKSPACE FORM

1-800-518-4726
SUPPORT@GRANTS.GOV

This Workspace form is one of the forms you need to complete prior to submitting your Application Package. This form can be completed in its entirety offline using Adobe Reader. You can save your form by clicking the "Save" button and see any errors by clicking the "Check For Errors" button. In-progress and completed forms can be uploaded at any time to Grants.gov using the Workspace feature.

When you open a form, required fields are highlighted in yellow with a red border. Optional fields and completed fields are displayed in white. If you enter invalid or incomplete information in a field, you will receive an error message. Additional instructions and FAQs about the Application Package can be found in the Grants.gov Applicants tab.

OPPORTUNITY & PACKAGE DETAILS:

Opportunity Number:	ETA-UIPL-13-23-BASE
Opportunity Title:	Fiscal Year (FY) 2024 State Workforce Agency Unemployment Insurance (UI) Resource Planning Targets and Guidelines
Opportunity Package ID:	PKG00283151
CFDA Number:	17.225
CFDA Description:	Unemployment Insurance
Competition ID:	ETA-UIPL-13-23-BASE
Competition Title:	Fiscal Year (FY) 2024 State Workforce Agency Unemployment Insurance (UI) Resource Planning Targets and Guidelines
Opening Date:	09/13/2023
Closing Date:	10/13/2023
Agency:	Employment and Training Administration
Contact Information:	Janice C. Sheelor

APPLICANT & WORKSPACE DETAILS:

Workspace ID:	WS01198185
Application Filing Name:	UI Base Funding 2024
UEI:	EMBXRXJNMHW3
Organization:	EXECUTIVE OFFICE OF LABOR & WO
Form Name:	Application for Federal Assistance (SF-424)
Form Version:	4.0
Requirement:	Mandatory
Download Date/Time:	Oct 11, 2023 08:49:50 AM EDT
Form State:	No Errors

FORM ACTIONS:

Application for Federal Assistance SF-424		
* 1. Type of Submission: ☐ Preapplication ☒ Application ☐ Changed/Corrected Application * 2. Type of Application: ☒ New ☐ Continuation ☐ Revision * If Revision, select appropriate letter(s): * Other (Specify): 		
* 3. Date Received: Completed by Grants.gov upon submission.		4. Applicant Identifier:
5a. Federal Entity Identifier: 		5b. Federal Award Identifier:
State Use Only:		
6. Date Received by State:		7. State Application Identifier:
8. APPLICANT INFORMATION:		
* a. Legal Name: MA Executive Office of Labor and Workforce Development		
* b. Employer/Taxpayer Identification Number (EIN/TIN): 04-6002284		* c. UEI: EMBYRXJNMHW3
d. Address:		
* Street1: 19 Staniford Street Street2: * City: Boston County/Parish: Suffolk * State: MA: Massachusetts Province: * Country: USA: UNITED STATES * Zip / Postal Code: 02114-2509		
e. Organizational Unit:		
Department Name: EOLWD		Division Name: DUA
f. Name and contact information of person to be contacted on matters involving this application:		
Prefix: Ms. * First Name: Katie Middle Name: * Last Name: Dishnica Suffix: Title: Director Organizational Affiliation: * Telephone Number: 617-626-5132 Fax Number: * Email: katie.dishnica@mass.gov		

Application for Federal Assistance SF-424		
* 9. Type of Applicant 1: Select Applicant Type: A: State Government Type of Applicant 2: Select Applicant Type: Type of Applicant 3: Select Applicant Type: * Other (specify):		
* 10. Name of Federal Agency: Employment and Training Administration		
11. Catalog of Federal Domestic Assistance Number: 17.225 CFDA Title: Unemployment Insurance		
* 12. Funding Opportunity Number: ETA-UIPL-13-23-BASE * Title: Fiscal Year (FY) 2024 State Workforce Agency Unemployment Insurance (UI) Resource Planning Targets and Guidelines		
13. Competition Identification Number: ETA-UIPL-13-23-BASE Title: Fiscal Year (FY) 2024 State Workforce Agency Unemployment Insurance (UI) Resource Planning Targets and Guidelines		
14. Areas Affected by Project (Cities, Counties, States, etc.): Add Attachment Delete Attachment View Attachment		
* 15. Descriptive Title of Applicant's Project: UIPL NO. 13-23 Fiscal Year (FY) 2024 State Workforce Agency Unemployment Insurance (UI) Resource Planning Targets and Guidelines		
Attach supporting documents as specified in agency instructions. Add Attachments Delete Attachments View Attachments		

Application for Federal Assistance SF-424	
16. Congressional Districts Of:	
* a. Applicant: MA-007	* b. Program/Project: MA-A11
Attach an additional list of Program/Project Congressional Districts if needed.	
	Add Attachment Delete Attachment View Attachment
17. Proposed Project:	
* a. Start Date: 10/01/2023	* b. End Date: 12/31/2024
18. Estimated Funding (\$):	
* a. Federal	59,137,074.00
* b. Applicant	0.00
* c. State	0.00
* d. Local	0.00
* e. Other	0.00
* f. Program Income	0.00
* g. TOTAL	59,137,074.00
* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?	
☐ a. This application was made available to the State under the Executive Order 12372 Process for review on .	
☐ b. Program is subject to E.O. 12372 but has not been selected by the State for review.	
☒ c. Program is not covered by E.O. 12372.	
* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)	
☐ Yes ☒ No	
If "Yes", provide explanation and attach	
	Add Attachment Delete Attachment View Attachment
21. *By signing this application, I certify (1) to the statements contained in the list of certifications** and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)	
☒ ** I AGREE	
** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.	
Authorized Representative:	
Prefix: Mr.	* First Name: Malachy
Middle Name:	
* Last Name: Rice	
Suffix:	
* Title:	Director of Federal Grants Management
* Telephone Number: 857-292-8836	Fax Number:
* Email: malachy.rice@mass.gov	
* Signature of Authorized Representative:	Completed by Grants.gov upon submission.
* Date Signed:	Completed by Grants.gov upon submission.

Attachment H3 Corrective Action Plans (CAPs)

State Quality Service Plan (SQSP) Corrective Action Plan (CAP) Excel Workbook Reporting Format Instructions

1. This Excel workbook will be used by states to develop their SQSP CAPs and to report updates to milestones and performance each quarter. The intent is to capture the state's SQSP performance improvement activities in a single document.
2. The "Biennial SQSP Overview" worksheet and the "Alternate Year Overview" worksheet provides an overview of the state's performance for the associated SQSP year.
 - Column "B" - Lists performance measures and programs areas by name.
 - Column "C" - Identifies the Acceptable Level of Performance (ALP) for each measure.
 - Columns "D" & "E" - Indicates if the CAP is a new (N) or existing (E) CAP.
 - Column "G" - Highlights performance results in "yellow" if a CAP is required. A corresponding CAP worksheet (tab) is included in the Workbook for developing the CAP and providing quarterly updates.
 - **Integrity Action Plan (IAP) Top Three Root Causes** for improper payments: The top three root causes are identified in rows 37-39 of the overview pages and are required to be addressed in each state's IAP. The IAP Word document template will be provided by the Regional Office.
 - Monitoring Findings/Audit Resolution:** Regional Offices may include monitoring findings and/or audit resolutions that remain open/unresolved at the time of the SQSP submission and may request the state report the actions being taken to resolve the open/unresolved finding.
3. **CAP Worksheets:**

◦Similar Performance Measures have been grouped together so that only one CAP/CAP Worksheet is required for these measures (i.e. First Payment Timeliness Measures, Lower Authority Appeals Promptness Measures).

◦Each CAP Worksheet (tab) is divided into the following sections:

- Performance Measures
- Performance Data
- Corrective Action Plan Summary
- Milestones and Completion Dates

NOTE: The CAP Excel Workbook should be kept as a full Workbook. Removal of any CAP worksheets from the Workbook will break links and diminish functionality of the Workbook.

Performance Measures

Each measure and program area the state is expected to address is pre-filled in each worksheet.

Performance Data

- a) The *ALP* (or criteria) is the nationally set minimally acceptable performance level that states are expected to meet. The ALP for each performance measure and program area to be addressed is pre-filled on the Worksheet.
- b) The "CAP Based on (Year of performance - specific to the measure) Performance" is the performance level achieved at the end of the measurement/performance period for the specific measure/program. The performance level will be listed numerically or listed as Pass/Fail (i.e. Tax Quality, Data Validation, etc). A majority of the core measures are based on 12 months of performance from April 1- March 31, while other measures may be based on the calendar year or the Payment Integrity Information Act (PIIA) year. The "measurement period" for each measure is listed in Handbook No. 336 and in an Attachment to the annual SQSP UIRL. This performance level is pre-filled by the ETA Regional Office.
- c) The "Target Performance" level is the 12-month cumulative performance level the state expects to achieve by each quarter ending date in line with the CAP and milestone activities. States should estimate the "target performance" level based on all the known factors at the time the CAP is submitted. The "target performance" level should be attainable based on the milestone achievements and should reflect incremental improvements from quarter to quarter. If the "target performance" level is changed during the SQSP period, the state should include an explanation as to why it was changed in the quarterly SQSP update.
- d) The "Actual Performance" level is the actual 12-month cumulative performance met as of the quarter ending date. For example, for the first quarterly report for quarter ending December 31, 2022, the "actual performance" level should be the cumulative performance achieved from January 1, 2022 - December 31, 2022. For the second quarterly report for quarter ending March 31, 2023, the "actual performance" level should be the cumulative performance achieved from April 1, 2022 - March 31, 2023. Most of the "actual performance" data is available at <https://oui.dola.gov/unemploy/DataDashboard.asp>.
If the "actual performance" level for a measure cannot be found, please contact your ETA Regional Office for assistance.

Corrective Action Plan Summary

The summary must address each of the following:

- a) the reason for the deficiency;
- b) a description of the specific actions/activities planned to improve performance;
- c) an explanation of why a previous plan was unsuccessful (if applicable);
- d) a plan for monitoring and assessing accomplishments of planned actions for each CAP; and
- e) remaining actions to be completed after the current CAP timeframe.

Enter an X in the "yellow" box on the CAP worksheet if the desired performance improvements will not be accomplished by the end of the two years for which the plan is in effect.

Note: The worksheet can be expanded to allow for additional space. ETA Regional Offices will provide technical assistance to states in developing the SQSP in the Excel format.

Milestones and Completion Dates

States must list specific milestones (key corrective action or improvement activities) and the completion date for each milestone in the space provided. Milestones must be established for each element of the state's CAP and be of sufficient number and frequency to oversee and assess their progress during the SQSP cycle. A completion date for each milestone should also be entered by selecting a date from the drop-down box.

Note: If a CAP worksheet is removed from the Excel workbook, the drop-down box functionality will not work as intended.

Quarterly Updates

States must provide a quarterly update for each milestone in the space provided. The update should describe if the milestone was completed as scheduled or explain if the milestone was not completed as scheduled. The state must submit a new target completion date if the milestone was not completed as scheduled.

Massachusetts						
MEASURES/PROGRAMS TO BE ADDRESSED FOR BIENNIAL SQSP FISCAL YEAR (FY) 2023						
	Measures/Programs to be Addressed (Each Measure Below is Hyperlinked to the CAP Worksheet)	Acceptable Level of Performance (ALP)	Corrective Action Plan (CAP)		Narrative Required (In Word Doc.)	SQSP 2023 Performance Year Data
			N	E		
B E N E F I T S	First Payment Promptness	≥ 87%		X		58.67%
	First Payment Promptness (IntraState 14/21 Days)	≥ 87%		X		59.53%
	First Payment Promptness (InterState 14/21 Days)	≥ 70%	X			58.02%
	First Payment Promptness (IntraState 35 Days)	≥ 93%		X		72.77%
	First Payment Promptness (InterState 35 Days)	≥ 78%	X			70.83%
	Nonmonetary Determination Timeliness	≥ 80%		X		25.96%
	Nonmonetary Determination Quality - Separations	≥ 75%		X		60.72%
	Nonmonetary Determination Quality - Nonseps	≥ 75%	X			64.14%
	Lower Authority Appeals (30 Days)	≥ 60%	X			4.76%
	Lower Authority Appeals (45 Days)	≥ 80%	X			10.02%
A P P E A L S	Average Age of Pending Lower Authority Appeals	≤ 30 days	X			228.0
	Average Age of Pending Higher Authority Appeals	≤ 40 days				28.0
	Lower Authority Appeals Quality	≥ 80%				93.51%
	New Employer Status Determinations Timelapse	≥ 70%				76.40%
	Tax Quality (Part A)	No more than 3 tax functions failing TPS in a year		X		Fail: SD - Inactivations Report Delinq Report Process Debits-Cont Debits-Reimb Credits/Refunds Benefit Charges
	Tax Quality (Part B)	The same tax function cannot fail for 3 consecutive years		X		Fail: SD - Inactivations Credits/Refunds
	TPS Sample Reviews	Pass	X			Fail: Debits - Cont. Debits-Reimb. Benefit Charges
	Effective Audit Measure	Pass 4 factors/score ≥ 7			X	Fail: Factor 1: 0.2 Factor 3: 0.4
	Improper Payments Measure	< 10%	X			28.283%
	Detection of Overpayments - 3 Year Measure	≥ 50% & ≤ 95%				79.36%
I N T E G R I T Y	Overpayment Recovery Measure	≥ 68%	X			3.6%
	Data Validation - Benefits (All Submitted & Passing)	All Benefit Pops Submitted & Passing		X		Fail: Populations 1-5, 8-15, Not Submitted: BTO 1-3
	Data Validation - Tax (All Submitted & Passing)	All Tax Pops Submitted & Passing		X		Fail: Populations 1 & 2
	NDNH BAM Compliance	Pass				Pass
	BAM Operations Compliant	Pass All M&P		X		Fail: 60-day Paid Timeliness: 67.47% 90-day Paid Timeliness: 86.43%
	Incorrect Recording of Issue Detection Date	95%				Pass
	Incorrect Recording of Determination Date	95%				Pass
	UI Reporting Requirements	Pass			X	Fail
	Percent of Intrastate Payments Made Timely	87%				59.53%
	Detection of Recoverable Overpayments	57.5%				38.47%
G P R A	Percent of Employer Tax Liability Determinations Made Timely	90%				79.42%
	Integrity Action Plan (IAP) Top Three Root Causes - Payment Integrity Information Act (PIIA) Year Data					
Benefit Year Earnings; Percent of Dollars OP 29.05%						
Separation Issues; Percent of Dollars OP 28.58%						
Other Eligibility; Percent of Dollars OP 25.57%						
Monitoring Findings/Audit Resolution						

Massachusetts					
MEASURES/PROGRAMS TO BE ADDRESSED FOR ALTERNATE SQSP FISCAL YEAR (FY) 2024					
	Measures/Programs to be Addressed (Each Measure Below is Hyperlinked to the CAP Worksheet)	Acceptable Level of Performance (ALP)	Corrective Action Plan (CAP)		SQSP 2024 Performance Year Data
			N	E	
B E N E F I T S	First Payment Promptness	≥ 87%		X	72.22%
	First Payment Promptness (IntraState 14/21 Days)	≥ 87%		X	72.64%
	First Payment Promptness (InterState 14/21 Days)	≥ 70%		X	69.11%
	First Payment Promptness (IntraState 35 Days)	≥ 93%		X	86.80%
	First Payment Promptness (InterState 35 Days)	≥ 78%			83.78%
	Nonmonetary Determination Timeliness	≥ 80%		X	60.63%
	Nonmonetary Determination Quality - Separations	≥ 75%		X	51.39%
	Nonmonetary Determination Quality - Nonseps	≥ 75%		X	70.83%
	Lower Authority Appeals (30 Days)	≥ 60%		X	16.57%
	Lower Authority Appeals (45 Days)	≥ 80%		X	22.24%
A P P E A L S	Average Age of Pending Lower Authority Appeals	≤ 30 days		X	128.0
	Average Age of Pending Higher Authority Appeals	≤ 40 days	X		92.0
	Lower Authority Appeals Quality	≥ 80%			91.14%
	New Employer Status Determinations Timelapse	≥ 70%			84.7%
T A X	Tax Quality (Part A)	No more than 3 tax functions failing TPS in a year		X	Fail: SD - New SD - Inactivations Field Audits Credits/Refunds
	Tax Quality (Part B)	The same tax function cannot fail for 3 consecutive years		X	Fail: SD - Inactivations Credits/Refunds
	TPS Sample Reviews	Pass			Pass
	Effective Audit Measure	Pass 4 factors/score ≥ 7		X	Fail: Factor 1: 0.6% Factor 3: 0.7%
	Improper Payments Measure	< 10%		X	23.49%
I N T E R G R A T I O N	Detection of Overpayments - 3 Year Measure	≥ 50% & ≤ 95%			78.13%
	Overpayment Recovery Measure	≥ 68%		X	11.08%
	Data Validation - Benefits (All Submitted & Passing)	All Benefit Pops Submitted & Passing		X	Fail: Benefits 1-5, 7-15; BTQ 1-3
	Data Validation - Tax (All Submitted & Passing)	All Tax Pops Submitted & Passing		X	Fail: Tax 4
	NDNH BAM Compliance	Pass			Pass
B A M	BAM Operations Compliant	Pass All M&P		X	Fail: Paid: 60 day timeliness= 58.50% Paid 90 day timeliness= 84.81% Denial Monetary Comparison Report = 116.96% Did not meet Paid sample selection = 441 Did not meet Denied sample selection: Separation = 135 Non-separation = 135
	Incorrect Recording of Issue Detection Date	95%			96.54%
	Incorrect Recording of Determination Date	95%			98.14%
	UI Reporting Requirements	Pass		X	Fail
	Percent of Intrastate Payments Made Timely	87%			72.64%
G P R A	Detection of Recoverable Overpayments	57.5%			70.64%
	Percent of Employer Tax Liability Determinations Made Timely	90%			81.50%
Integrity Action Plan (IAP) Top Three Root Causes - Payment Integrity Information Act (PIIA) Year Data					
1. Work Search; Percent of Dollars OP 26.146%					
2. Separation Issues; Percent of Dollars OP 19.627%					
3. Benefit Year Earnings; Percent of Dollars OP 16.039%					
Monitoring Findings/Audit Resolution					

First Payment Promptness												
Federal Fiscal Year: 2023-2024 SQSP Corrective Action Plan & Progress Report					Back to Biennial Overview 2023				Back to Alternate Overview 2024			
State: Massachusetts					Federal Fiscal Year 2023				Federal Fiscal Year 2024			
Performance Measures	ALP	QIP Based on 6/30/2023 Performance	QIP Based on 6/30/2023 Performance	State's Target/Planned Performance	12/31/2022 Quarter 1	3/31/2023 Quarter 2	6/30/2023 Quarter 3	9/30/2023 Quarter 4	12/31/2023 Quarter 1	3/31/2024 Quarter 2	6/30/2024 Quarter 3	9/30/2024 Quarter 4
First Payment Promptness: % of all 1st payments within 14/21 days after the compensable week.	≥ 87%	58.67%	72.22%	Target	60.0%	62.0%	64.0%	66.0%	68.0%	70.0%	72.0%	74.0%
				Actual	74.8%	72.2%	79.1%					
First Payment Promptness, 14/21 days intrastate UI full weeks	≥ 87%	59.59%	72.64%	Target	60.0%	62.0%	64.0%	66.0%	68.0%	70.0%	72.0%	74.0%
				Actual	74.7%	72.6%	79.5%					
First Payment Promptness, 14/21 days interstate UI full weeks	≥ 70%	58.02%	69.11%	Target	60.0%	62.0%	64.0%	66.0%	68.0%	70.0%	72.0%	74.0%
				Actual	71.1%	69.1%	70.5%					
First Payment Promptness, 35 days intrastate UI full weeks	≥ 99%	72.77%	86.80%	Target	75.0%	77.0%	79.0%	81.0%	83.0%	85.0%	87.0%	89.0%
				Actual	89.3%	86.8%	88.2%					
Regional Office Comments in cell below:												
Corrective Action Plan Summary												
The Summary must provide:												
Alternate Year Plan Updates.												
A. The Reason for the deficiency.												
A. The reason for failing to meet the First Payment Promptness metric continues to be our adjudication backlog of issues over twenty-one days, our lack of fully trained staffing resources, the number of unidentified employers on claims, the number of predicate issues and the increase in fraud cases. The top four category of issues pending are quit, discharge and earnings. We continue to work through the residual effects the pandemic has had on our capacity to address adjudication workflow volume.												
Alternate Year Plan Updates. A. We continue to improve significantly and are meeting our Quarterly Target goals. The reason for failing to meet the First Payment Promptness metric as this time continues to be our adjudication backlog, fraud cases, predicate issues, our lack of fully trained staffing resources. We have worked hard to work through the effects the pandemic had to address our high volume of adjudication. We continue to focus on our highest queues, however also focus on our timely first payments.												
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities: aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan.												
B. Our plan to resolve the identified issues is to apply a series of procedural/process changes as well as introduce a more rigorous training/re-training program. FY 2021-2022 we continued to hire, and train limited duration adjudication staff. To date, we have 228 staff that have been trained in adjudication and are currently working on backlog issues. In addition to adding more staff, the agency has put into practice new processes and procedures to streamline adjudication. Some of these include pre-adjudication from front line staff, weekly group meetings to brainstorm new ideas for streamlining, and the implementation of our live adjudication escalation process. Moreover, for the past year, all predicate issues have been handled immediately through our live adjudication process. Additionally, as recently as July 2022 we concentrated efforts on our unidentified employer queues (ERP and ENOC). This helps to ensure initial claims are processed timely and any non-monetary issues on the claim move along the adjudication process in a timely manner. We also continue to utilize our data tools (Power BI) for both adjudication and claims to analyze the work being completed vs the work coming in and adjusting the way we do business according to these results. Since implementation of some of these changes, we have seen a significant decrease in our adjudication backlog and an increase in the timely completion of non-monetary issues.												
Alternate Year Plan Updates. B. Our plan to resolve the backlog issues is to tackle the issues from both ends, oldest and newest. This provides a more efficient streamline of handling our adjudication issues. This streamline of adjudication will allow us not to continue to add to the backlog as we are addressing timely first pay issues. We utilize our limited duration staff to work on the highest issue backlog and our permanent teams to work on timely first pay issues. We have assigned all of our predicate issue backlog to be addressed and will continue to address if any are not resolved at time of filing claim through our Adjudication phone lines. We have implemented many clean up projects for adjudication with specific issues and continue in order to keep them manageable. We will have our REC team work on our unidentified employer queue, this will help to ensure initial claims are processed timely and any non-monetary issues on the claim move along the adjudication process in a timely manner. We continue to convert limited duration staff into permanent positions, which we then provide them with full adjudication training providing a better understanding. This will effect both quality and quantity of adjudication issues. To assist all of our adjusters with better quality of case work, we have trained our Supervisory staff to perform internal BTQs to ensure accuracy and efficiency and provide feedback to our Adjusters in their quality of cases. We streamlined a more efficient process with our other departments which we receive calls from and have issues on hold due to action from other departments needed. This allows the work to be addressed from other departments in order for us to move forward with pending non-monetary issues. We continue to analyze work being completed through our data tool (Power BI) and the work coming in, looking at results and making any adjustments needed due to new trends or upticks in specific issues. We have seen a significant decrease in our adjudication backlog and an increase in the timely completion of non-monetary issues.												
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful.												
C. Parts of the plan that were in place the previous year are still ongoing. Working remotely still poses challenges, but we are making progress. The addition of our live adjudication process continues to provide direct access to an adjuster and timely resolution of issues. This new process was put in place June of this year. We continue to monitor the impact of the certification questions enhancement and it has continued to reduce the number of issues created through the continued claims process. The pre-adjudication ideas from our brainstorming sessions were executed and significantly assisted in the reduction of our backlog. Although these changes have helped greatly, we will continue to assess our processes and make changes we believe will make a difference in service and turnaround time. Our goal is to continue to improve and hit our performance goals consistently.												
Alternate Year Plan Updates. C. We were successful in improving performance as our numbers have greatly improved, with the additions and changes to the plan we would just need more time to continue to improve and successfully meet. With streamlining a better workflow and our ongoing clean up projects we feel our success will continue. Our adjudication phone lines continue to be a direct access to an adjuster and timely resolution of issues. In our prior plan, we were tackling our highest issues and clean up projects and assisting with timely first pay through our adjuster phone lines and with the additions to the plan, we will also be working our timely first pay issues through streamlining them to be worked by our permanent adjusters, working both ends - backlog and timely first pay issues, this way our timely first pay issues are not added or become our backlog. Our continued efforts on training and focusing on quality as well as does help with quantity of cases being done by our adjusters, once you have the quality then will follow and increase. Our goal is to continue to improve and hit our performance goals on a consistent basis, we do anticipate we will meet as we are trending in that direction.												
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals.												
D. DUA will continue to utilize the adjudication dashboards to better manage staff and monitor issue creation vs issue reduction over time. In addition, a claims dashboard has been created and will be used similarly. This will help us better track incoming calls and key performance indicators. We will continue sending the DUA First Payment Promptness Executive Dashboard numbers to the Regional Office on a weekly basis. In addition, we will continue to track our performance progress through the increased utilization of existing and newly developed internal management reports.												
Alternate Year Plan Updates. D. We will continue with our weekly reports on our issues resolved and the issue types with our non-monetary issues to review trends/upticks. We will continue to monitor our adjudication clean up projects to stay current with predicate issues, backlog issues, and our highest queue issues. We will have our bi-weekly meetings with adjudication supervisory staff to ensure consistency and communication. We will continue to review through our internal BTQ process our adjusters' issues and provide feedback to ensure quality in cases. We will continue to monitor our top reasons for calls from our claimants to ensure we are working on streamlining and keeping current with processes and procedures in place. Our supervisory staff will continue to utilize our dashboards to monitor and better manage our staff.												
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved.												
(Enter Remaining Major Actions Here)												
Milestones												Completion Date
1. Continue to monitor contact center workflow and make adjustments to business procedures to improve customer experience												9/30/2024
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022):												
We continue to rely on the adjudication dashboard to better manage staff and the adjudication workload. Having realtime access to adjudication data has allowed us to quickly have staff focus on the issue types with the highest backlog. We continue to streamline our adjudication process with our live adjudication feature, which allows claimants who call in with a non-monetary issue pending to be immediately connected to an adjuster to work on their non-monetary issue. If issue is already assigned to an adjuster and has not been resolved, we implemented an issue already assigned spreadsheet which is managed daily.												
FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023):												
Towards the end of this quarter, we put together a plan to bring back vendor staff to assist with our high volume calls and this will free up our limited duration staff on phones to be able to work on adjudication. We have planned/implemented a backlog Reduction Plan for Adjudication. We need to work both ends as we do not continue to add to our backlog. We have our seasoned Adjusters working on all issues Timely First Pay, while we have our limited duration adjusters working on backlog issues tackling our highest queues. These queues can shift as we monitor the workload. We continue our live adjudication and issues already assigned spreadsheet for claimant who call in with a non-monetary issue pending to be worked on right away and provide the up front improved customer service. We provide a weekly report showing our issues pending in comparison to prior week to show any spikes or trends. We check daily our adjudication dashboard to manage adjudication workload as needed.												
FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023):												

Higher Authority Appeals Promptness							
Federal Fiscal Year: 2023-2024 SQSP Corrective Action Plan & Progress Report					Back to Alternate Overview 2024		
State: Massachusetts					Federal Fiscal Year 2024		
Performance Measures	ALP	CAP Based on 04/01/2022 - 03/31/2023 Performance	State's Target/Actual Performance	12/31/2023 Quarter 1	3/31/2024 Quarter 2	6/30/2024 Quarter 3	9/30/2024 Quarter 4
Average Age of Pending Higher Authority Appeals	≤40 days	92.00	Target	75.0	60.0	50.0	40.0
				Actual			
Regional Office Comments in cell below:							
Corrective Action Plan Summary							
The Summary must provide:							
Alternate Year Plan Updates							
A. The Reason for the deficiency.							
The deficiency in meeting the timelapse standard is the result of two factors. First, the large number of PUA appeals received as a result of the COVID pandemic (for example - during the height of the pandemic the Board was receiving over 600 PUA appeals every month), and secondly, beginning in June 2022, the Board has experienced a substantial increase in the number of regular UI appeals received during that time period. This is because the DUA Hearings Department is working through the backlog they had accumulated in both PUA and Regular UI appeals.							
Alternate Year Plan Updates							
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities; aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan.							
We have already identified and triaged our target oldest cases, and have begun to assign them to our Case Disposition Team consisting of Board Counsel and three Staff Attorneys. Cases have been and will be assigned to these individuals based on issue type and difficulty of the case. In addition, we have shifted casework to allow for our other staff attorneys to continue working on the review and disposition of their oldest cases. Our Case Disposition team will meet weekly moving forward to measure the success of the team, and to review status of currently assigned cases, and to be assigned new cases. On an ongoing basis, the Board Counsel and Board Members will provide assistance and any necessary specialized legal training so that these cases can be review expeditiously.							
Alternate Year Plan Updates							
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the No prior plan was in place.							
Alternate Year Plan Updates							
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals.							
Initially, the Board will identify and triage all cases with an age over 100 days, and create a case disposition team led by the Board Counsel to review and dispose of these cases as expeditiously as possible. We will also allot writing time for other staff attorneys to clear out their personal backlogs and dispose of their older cases.							
Alternate Year Plan Updates							
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the							
(Enter Remaining Major Actions Here)							
Milestones							
						Completion Date	
1. Reduce our average timelapse age of open cases from 92 to 75 by Quarter 1 and incrementally thereafter by triaging and disposing of open cases.						12/31/2023	
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
2. Reduce our average timelapse age of open cases from 75 to 60 by Quarter 2 and incrementally thereafter by continuing to triage and dispose of open cases.						Completion Date	
						3/31/2024	
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							

3. (Enter next milestone here)	Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
4. (Enter next milestone here)	Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
5. (Enter next milestone here)	Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
6. (Enter next milestone here)	Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	

The Contact Center undertook an initiative to address the backlog of pending non-monetary issues and reviewing our procedures and processes. We created a workgroup of cross-section of staff from Agents, Adjusters, Supervisors, and Management to meet weekly and brainstorm out-of-the-box ideas to reduce backlog of pending non-monetary issues and improve current processes. Some highlights from this group, are we increased coordination and efficiency working with Wage Processing unit, with creating a more efficient spreadsheet. The agents were provided with a training in wage processing to help better assist our claimants. Many ideas to help reduce backlog came from this on-going group, we pulled a query for all pending non-monetary issues over a year and assigned to all adjudication teams to have a few of their adjusters work on this. We also pulled query on separation issues with only one party responding to fact finding, this allows for the less experience staff to resolve the less complex issues and allows the FTE Adjusters who are more experienced to handle the more complex issues. Prior to returning hybrid in May, we held three highly successful "pop-up" in person sessions for Signature Healthcare/Brockton Hospital staff in our Brockton location, which assisted with the se claimants filing claims, setting up and any pending issues, and any questions the claimant may have had. While we had outsourced FHC staff covering our phone lines from beginning of April through mid-June, we were able to utilize our limited duration adjusters who were covering phones due to high volume back to reducing adjudication backlog. Our seasoned adjusters continue work on Timely First Pay issues while our limited duration staff work on backlog issues, our backlog Reduction Plan for Adjudication is ongoing. Our live adjudication phone shifts and issues already assigned spreadsheet continue, which helps have issues worked on right away as claimants are calling in for assistance with pending issues.

FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023):

FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):

FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):

FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):

FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):

2. Use Limited Duration staff to augment personnel resources

Completion Date

9/30/2024

FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022):

We currently have 140 limited duration staff, they were all used to assist with claimants with the completion of fact-finding and the adjudication of specific issues types. They would also be used to assist claimants with customer assistance calls due to volume on a daily basis as needed. We have split the limited duration staff to consistently assist claimants with customer assistance calls and the other half to consistently assist claimants with the completion of fact-finding and the adjudication of specific issues. This results in staff working more efficiently due to their focus being on one specific duty. We converted limited duration staff into permanent positions so the staff member is able to continue working cases or customer assistance without a time lapse. This has resulted in less resources necessary with training and supporting new hires and can focus on meeting timeliness standards.

FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023):

We currently have 121 limited duration staff. During this quarter we continued to have half of them assist claimants with customer assistance calls due to the volume of calls. The other half continued to work on Adjudication - backlog issues. Towards the end of the quarter we were able to take those who assisted with calls off of the phones and have them adjudicate issues due to our vendor staff coming back to assist with calls. We continued to convert limited duration adjusters into permanent positions, which results in less resources in training/mentoring and the focus can be on meeting timeliness standards.

FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023):

During this quarter, we utilized our limited duration adjudication staff who were on the claims/customer assistance phone lines full-time to perform adjudication on specific issues while outsourced FHC staff covered phone lines from beginning of April to mid May, which assisted with our reduction in backlog. The specific queues which limited duration adjusters worked on went down significantly, the reduced pending issues in these queues went down an average of 75%. Through the workgroup that was created during this quarter to reduce backlog of pending non-monetary issues and improve current processes, some highlights with limited duration staff was utilizing select limited duration staff on oldest backlog issues over a year, a query that was pulled. Utilized limited duration staff to handle the less complex issues in query pulled for separation issues with one party responding. In June, we re-allocated and retrained some of our limited duration staff for phones due to compensate with loss of outsourced vendor of FHC. They received training for Revenue/Wage Processing and Overpayment screens. Due to this training, the limited duration staff back on phones are now better able to assist claimants with questions on claims and able to identify/ troubleshoot reasons for non-payment. We have about 70% of our limited duration adjusters continuing to adjudicate our highest queues backlog and the other 30% were placed back on phones to assist with call mid-June. We continue to convert limited duration adjusters into permanent positions, which result in less resources in training/mentoring and the focus can be on meeting timeliness standards.

FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023):

FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):

FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):

FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):

FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):

3. Identify any non-adjudication roadblocks and create a plan to execute	Completion Date
	9/30/2024
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022): We continue to concentrate our efforts on our unidentified employer queues (ERP and ENOC). This helps to ensure initial claims are processed timely and any new monetary issues on the claim are moved along the adjudication process in a timely manner. We were utilizing all limited duration staff to assist with customer assistance calls as needed on a daily basis due to high call volume. We then split our limited duration staff so half can assist at all times with customer assistance calls coming into the Contact Center and to better assist our customers, as this is their only duty. FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023): During majority of this quarter, we continued with utilizing half our limited duration staff to assist with customer assistance calls on a daily basis due to volume and to better assist our customers. We planned/implemented our Reemployment staff to work on our unidentified queues (ERP and ENOC) on a daily basis to help ensure initial claims are processed timely, since our agent staff are busy with volume of calls. Many of our calls were found to be Program Integrity and/or Wage Processing calls, we worked on streamlining these calls/questions on a spreadsheet for such departments to handle to help better focus on our customer assistance/Adjudication calls, which will assist and better timeliness. FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023): During this quarter, the outsourced FHC vendor staff assisted us with our high volume incoming calls from beginning of April through mid-June. We have had a high number of wage processing calls come into the contact center and we implemented a wage processing training for our staff on phones and created a more efficient spreadsheet for the wage processing calls. Due to this training, staff are able to better assist claimants with questions related to wage processing on claims. They are also able to identify and troubleshoot reasons for non-payment. Our contact center staff received on-going training during this quarter for BMT, which is our new system going live for Revenue in September, this training assisted with getting our staff familiar with the new system and ready for when Revenue portion goes live with the new system. Our Reemployment staff continue to work on our unidentified queues (ERP and ENOC) on a daily basis to help ensure initial claims are processed timely. FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023): FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023): FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024): FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024): FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
4. Develop & Deliver new/refresher adjudication training	Completion Date
	12/31/2023
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022): We conducted a refresher fact finding training for all of our seasoned adjusters and limited duration adjusters for efficiency, this will save time in fact finding as staff will be more efficient. A refresher training was provided in Earnings/fraud issues for our seasoned adjusters who work on these issues due to this issue being most time consuming and where most training was needed amongst our seasoned adjusters. We conducted an internal BTQ training for our adjudication supervisory teams in order for them to conduct internal BTQs on our staff's cases periodically and provide consistency and feedback to our staff, which helps with quality of cases and determines what trainings/refresher trainings are needed with staff, this will allow the adjuster to be more efficient. FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023): We conducted an All Adjudication training for our converted limited duration adjusters to permanent adjuster positions. This training covered all issues and was completed during this quarter and is then followed up with mentoring from our supervisors to ensure quality of work. This training then allows our converted permanent adjusters to work on timely issues/all issues, which will prevent the timely issues being added to our backlog issues. The All Adjudication training consisted of 17 days of training during this quarter. We continued our internal BTQ training during this quarter with our supervisors by having them perform live BTQs in their weekly meetings with each other, this promotes consistency amongst the teams and opens up discussions. Internal BTQs are being checked by UI Performs and feedback meeting provided to ensure understanding and consistency with our internal BTQs. This ongoing training allows our supervisors to learn together as a team. The feedback provided to our staff on their cases from our supervisors through the internal BTQs will allow adjusters to be more efficient as it will help with the quality of cases. This will continue to help determine where trainings are needed with our staff. FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023): When our limited duration adjusters who were on phones fulltime were released from phone duty during this quarter, they were trained on specific issues to bring those high queue issues down. They received training on 24(b) issues, Late response issues, late appeal issues, and reporting requirement issues, which all queues were reduced pending issues by an average of 75%. These training were then followed up with mentoring and reviewing of cases by our supervisory staff to ensure quality of work. We continued during this quarter with the training for all contact center supervisory staff with UI Performs supervisors to learn how Federal BTQ (Benefit Timely Quality) scoring is done and using that criteria for regular internal BTQ scoring of cases for their adjudication staff. Monthly review of scoring and follow-up meeting with UI Performs supervisors scheduled to ensure consistency and continuous learning for contact center supervisory staff. Internal BTQs help us determine where training is needed and will allow adjusters to be more efficient as it will help with the quality of the case. During this quarter, our supervisory staff continued to mentor our converted permanent adjusters who completed All Adjudication training last quarter. They check cases for quality and hold meeting as needed to help with the quality of their cases. They are then released to work on issues independently once the quality of such issues are reached. FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023): FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023): FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024): FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024): FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
5. (Enter next milestone here)	Completion Date
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022): FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023): FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023): FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023): FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023): FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024): FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024): FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
6. (Enter next milestone here)	Completion Date
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022): FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023): FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023): FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023): FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023): FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024): FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024): FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	

DRAFT March 2026 Update

7. (Enter next milestone here)	Completion Date
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022):	
FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023):	
FY 2023 Quarter 3 Status Report (Quarter Ending 6/30/2023):	
FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023):	
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	

Nonmonetary Determination Timeliness											
Federal Fiscal Year: 2023-2024 ICSP Corrective Action Plan & Progress Report						Back to Blended Overview 2023			Back to Alternate Overview 2024		
State: Massachusetts						Federal Fiscal Year 2023			Federal Fiscal Year 2024		
Performance Measures	ALP	CAP Based on 6/4/2023-10/30/2023 Performance	CAP Based on 6/4/2023-10/30/2023 Performance	State's Target/Actual Performance		12/31/2023 Quarter 1	3/31/2023 Quarter 2	6/30/2023 Quarter 3	9/30/2023 Quarter 4	12/31/2023 Quarter 1	3/31/2024 Quarter 2
Nonmonetary Determination Timeliness	≥ 80%	25.96%	60.63%	Target	35.0%	35.0%	40.0%	45.0%	50.0%	55.0%	60.0%
				Actual	64.8%	66.6%	65.9%			69.0%	67.0%
Regional Office Comments in cell below:											
Corrective Action Plan Summary											
The Summary must provide:											
Alternate Year Plan Updates A. The Reason for the deficiency. A. The reason for failing to meet the Non-Monetary Determination Timeliness metric continues to be the number of issues that are getting created up front, adjudication backlog of issues over twenty-one days, and our lack of fully trained staffing resources. We continue to work through the effect the pandemic has had on our capacity to address adjudication workflow volume. Alternate Year Plan Updates. A. We continue to improve significantly and are meeting our Quarterly Target goals. The reason for failing to meet the First Payment Promptness metric as this time continues to be our adjudication backlog, fraud cases, predate issues, our lack of fully trained staffing resources. We have worked hard to work through the effects the pandemic had to address our high volume of adjudication. We continue to focus on our highest queues, however also focus on our timely first payments. B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities: aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. B. Our plan to resolve the identified issues is to apply a series of procedural/process changes as well as introduce a more rigorous training/re-training program. FY 2021-2022 we continued to hire, and train limited duration adjudication staff. To date, we have 226 staff that have been trained in adjudication and are currently working on backlog issues. In addition to adding more staff, the agency has put into practice new processes and procedures to streamline adjudication. Some of these include pre-adjudication from front line staff, weekly group meetings to brainstorm new ideas for streamlining, and the implementation of our live adjudication escalation process. Moreover, for the past year, all predate issues have been handled immediately through our live adjudication queue. We also continue to utilize our data tools (Power BI) for adjudication work being completed vs the work coming in and adjusting the way we do business according to these results. Since implementation of some of these changes, we have seen a significant decrease in our adjudication backlog and an increase in the timely completion of non-monetary issues. Alternate Year Plan Updates. B. Our plan to resolve the backlog issues is to tackle the issues from both ends, oldest and newest, this provides a more efficient streamline of handling our adjudication issues. This streamline of adjudication will allow us not to continue to add to the backlog as we are addressing timely first pay issues. We utilize our limited duration staff to work on the highest issue backlog and our permanent teams to work on timely first pay issues. We have assigned all of our predate issue backlog to be addressed and will continue to address if any are not resolved at time of filing claim through our Adjudication phone lines. We have implemented many clean up projects for adjudication with specific issues and continue in order to keep them manageable. We will have our REC team work on our unidentified employer queue, this will help to ensure initial claims are processed timely and any non-monetary issues on the claim move along the adjudication process in a timely manner. We continue to convert limited duration staff into permanent positions, which we then provide them with full adjudication training, which provides a better understanding. This will affect both quality and quantity of adjudication issues. To assist all of our adjudicators with better quality case work, we have trained our supervisory staff to perform internal BTGs to ensure accuracy and efficiency and provide feedback to our Adjudicators on their quality of cases. We streamlined a more efficient process with our other departments which we receive calls from and have issues on hold due to action from other departments needed. This allows the work to be addressed from other departments in order for us to move forward with pending non-monetary issues. We continue to analyze work being completed through our data tool (Power BI) and the work coming in, looking at results and making any adjustments needed due to new trends or upticks in specific issues. We have seen a significant decrease in our adjudication backlog and an increase in the timely completion of non-monetary issues. C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the actions now specified will be more successful. C. The plan that was in place for the previous year is still ongoing with some additions. Working remotely still poses challenges, but we are making progress. The fact-finding line continues to provide direct access to the queue, without having to pass through the screening process. This tool is still in place. The enhancement to the weekly certification process has been completed and implemented. We will continue to monitor the impact this enhancement has on reducing the number of issues created through the continued claims process. We will also monitor and assess how the newly created pre-adjudication ideas have reduced the number of calls coming in and the amount of issue being created up front. Although these changes have helped greatly, we will continue to assess our processes and making changes where we believe will make a difference in service and turnaround time. Our goal is to continue to improve and hit our performance goals consistently. Alternate Year Plan Updates. C. We were successful in improving performance as our numbers have greatly improved, with the additions and changes to the plan we would just need more time to continue to improve and successfully meet. With streamlining a better workflow and our ongoing clean up projects we feel our success will continue. Our adjudication phone lines continue to be a direct access to an adjudicator and timely resolution of issues. In our prior plan, we were tackling our highest issues and clean up projects and assisting with timely first pay through our adjudicator phone lines and with the additions to the plan, we will also be working our timely first pay issues through streamlining them to be worked by our permanent adjudicators, working both ends - backlog and timely first pay issues, this way our timely first pay issues are not added or become our backlog. Our continued efforts on training and focusing on quality as well as help with quantity of cases being done by our adjudicators, once you have the quality the quantity then will follow and increase. Our goal is to continue to improve and hit our performance goals on a consistent basis, we do anticipate we will meet as we are trending in that direction. D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. D. DUA will continue to utilize the adjudication dashboards to better manage staff and monitor issue creation vs issue reduction over time. In addition, a claims dashboard has been created and will be used similarly. This will help us better track incoming calls and key performance indicators. We will continue sending the DUA First Payment Promptness Executive Dashboard numbers to the Regional Office on a weekly basis. In addition, we will continue to track our performance progress through the increased utilization of existing and newly developed internal management reports. Alternate Year Plan Updates. D. We will continue with our weekly reports on our issues resolved and the issue types with our non-monetary issues to review trends/updates. We will continue to monitor our adjudication clean up projects to stay current with predate issues, backlog issues, and our highest queue issues. We will have our bi-weekly meetings with adjudication supervisory staff to ensure consistency and communication. We will continue to review through our internal BTG process our adjudicators cases and provide feedback to ensure quality in cases. We will continue to monitor our top reasons for calls from our claimants to ensure we are working on streamlining and keeping current with processes and procedures in place. Our supervisor staff will continue to utilize our dashboards to monitor and better manage our staff.											
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance goal will be achieved.											
(Enter Remaining Major Actions Here)											
Milestones											
1. Monitor, Improve & Develop adjudication processes and procedures										Completion Date	9/30/2024
FY 2023 Quarter 1 Status Report [Quarter Ending 12/31/2022]:											
We continue to rely on the adjudication dashboard to better manage staff and the adjudication workload. Having real-time access to adjudication data has allowed us to quickly have staff focus on the issue types with the highest backlog. We continue to streamline our adjudication process with our live adjudication feature, which allows claimants who call in with a non-mon issue pending to be immediately connected to an adjudicator to work on their non-monetary issue. If issue is already assigned to an adjudicator and has not been resolved, we implemented an issue already assigned spreadsheet which is managed daily.											
FY 2023 Quarter 2 Status Report [Quarter Ending 3/31/2023]:											
Towards the end of this quarter, we put together a plan to bring back vendor staff to assist with our high volume calls and this will free up our limited duration staff one phone to be able to work on adjudication. We have planned/implemented a backlog reduction plan for adjudication. We need to work both ends so we do not continue to add to our backlog. We have our seasoned Adjudicators working on all issues Timely First Pay, while we have our limited duration adjudicators working on backlog issues tackling our highest queues. These queues can shift as we monitor the workload. We continue our live adjudication and issues already assigned spreadsheet for claimant who call in with a non-mon issue pending to be worked on right away and provide the up front improved customer service. We provide a weekly report showing our issues pending in comparison to prior week to show any spikes or trends. We check daily our adjudication dashboard to manage adjudication workload as needed.											
FY 2023 Quarter 3 status report [Quarter Ending 6/30/2023]:											
During this quarter, we led a system auto-script to void pending non-monetary issues on claims determined to be fraudulent. Previously, the Contact Center had to have a query run to identify these issues and have our adjudicator staff go in on each claim and manually void each pending non-monetary issue on a fraudulent claim. This resulted in reduction in adjudication backlog and eliminated using resources for this action. The Contact Center undertook an initiative to address the backlog of pending non-monetary issues and reviewing our procedures and processes. We created a workgroup of cross-section of staff from Agents, Adjudicators, Supervisors, and Management to meet weekly and brainstorm out-of-the-box ideas to reduce backlog of pending non-monetary issues and improve current processes. Many ideas to help reduce backlog came from this on-going group, we pulled a query for all pending non-monetary issues over a year and assigned to all adjudication teams to have a few of their adjudicators work on this. We also pulled query on separation issues with only one party responding to fact finding, this allows for the less experienced staff to resolve the less complex issues and allows the FTE Adjudicators who are more experienced to handle the more complex issues. Prior to returning hybrid in May, we held three highly successful "pop-up" in person sessions for Signature Healthcare/Brockton Hospital staff in our Brockton location, which assisted with those claimants filing claims, setting up and any pending issues, and any questions the claimant may have had. While we had outsourced FHC staff covering our phone lines from beginning of April through mid-June, we were able to utilize our limited duration adjudicators who were covering phones due to high volume back to reducing adjudication backlog. Our seasoned adjudicators continue work on Timely First Pay issues while our limited duration staff work on backlog issues, our backlog Reduction Plan for Adjudication is ongoing. Our live adjudication phone shifts and issues already assigned spreadsheet continue, which helps have issues worked on right away as claimants are calling in for assistance with pending issues.											
FY 2023 Quarter 4 Status Report [Quarter Ending 9/30/2023]:											
FY 2024 Quarter 1 Status Report [Quarter Ending 12/31/2023]:											
FY 2024 Quarter 2 Status Report [Quarter Ending 3/31/2024]:											
FY 2024 Quarter 3 Status Report [Quarter Ending 6/30/2024]:											

FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
2. Use Limited Duration staff to augment personnel resources	Completion Date
	9/30/2024
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022):	
We currently have 140 limited duration staff, they were all used to assist with claimants with the completion of fact-finding and the adjudication of specific issues types. They would also be used to assist claimants with customer assistance calls due to volume on a daily basis as needed. We have split the limited duration staff to consistently assist claimants with customer assistance calls and the other half consistently assist claimants with the completion of fact-finding and the adjudication of specific issues to work more efficiently due to focus being on specific duty. We convert limited duration staff into permanent positions as staff member is able to continue working cases or customer assistance without a time lapse, this results in less resources for training.	
FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023):	
We currently have 121 limited duration staff. During this quarter we continued to have half of them assist claimants with customer assistance calls due to the volume of calls. The other half continued to work on Adjudication - backlog issues. Towards the end of the quarter we were able to take those who assisted with calls off of the phones and have them adjudicate issues due to our vendor staff coming back to assist with calls. We continued to convert limited duration adjusters into permanent positions, which results in less resources in training/mentoring and the focus can be on meeting timeliness standards.	
FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023):	
During this quarter, we utilized our limited duration adjudication staff who were on the claims/customer assistance phone lines fulltime to perform adjudication on specific issues while outsourced FHC staff covered phone lines from beginning of April to mid-May, which assisted with our reduction in backlog. The specific queues which limited duration adjusters worked on went down significantly, the reduced pending issues in these queues went down an average of 75%. Through the workgroup that was created during this quarter to reduce backlog of pending non-monetary issues and improve current processes, some highlights with limited duration staff was utilizing select limited duration staff on oldest backlog issues over a year, a query that was pulled. Utilized limited duration staff to handle the less complex issues on query pulled for separation issues with one party responding. In June, we re-allocated and retrained some of our limited duration staff for phones due to compensate with loss of outsourced vendor of FHC. They received training for Revenue/Wage Processing and Overpayment screens. Due to this training, the limited duration staff back on phones are now better able to assist claimants with questions on claims and able to identify/troubleshoot reasons for non-payment. We have about 70% of our limited duration adjusters continuing to adjudicate our highest queues backlog and the other 30% were placed back on phones to assist with call mid-June. We continue to convert limited duration adjusters into permanent positions, which result in less resources in training/mentoring and the focus can be on meeting timeliness standards.	
FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023):	
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	

3. Use data collecting resources to monitor and forecast adjudication impediments and successes	Completion Date
9/30/2024	
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022): We continue sending the DUA non-monetary tracking issues numbers on a weekly basis which helps with noticing any upticks in issues and will then allow us to shift gears and focus on specific issues needed. FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023): We have our supervisors pulling their adjusters quantity of issues resolved through the adjudication dashboards to show staff progress and/or if average is low in comparison this will initiate conversations to see what the impediments may be for the individual staff member. We continue sending the DUA non-monetary tracking issues report on a weekly basis, which helps us notice any trends or upticks in issues and will then allow us to shift gears and focus on specific issues needed. FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023): Our supervisors pull the adjusters' quantity of issues resolved through the adjudication dashboards and will initiate conversations in their one on one meetings with staff to discover any impediments for the staff member or to assist and get any training needed that may boost quantity. DUA non-monetary tracking issues are sent weekly, which is used to pick up on any trends or increase/decrease in our adjudication queues. We update any spreadsheets being worked on for adjudication to monitor the progress and success of it, some examples are issues over a year, reasonable assurance issues, and late appeal issues. These issues are important to handle in a timely manner and not let backlog be created. FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023): FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023): FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024): FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024): FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
A. Develop & Deliver new/refresher adjudication training	Completion Date
12/31/2023	
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022): We conducted a refresher fact finding training for all of our seasoned adjusters and limited duration adjusters for efficiency, this will save time in fact finding as staff will be more efficient. A refresher training was provided in Earnings/Fraud issues for our seasoned adjusters who work on these issues due to this issue being most time consuming and where most training was needed amongst our seasoned adjusters. We conducted an internal BTQ training for our adjudication supervisory teams in order for them to conduct internal BTQs on our staffs cases periodically and provide consistency and feedback to our staff, which helps with quality of cases and determines what trainings/refresher trainings are needed with staff, this will allow the adjuster to be more efficient. FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023): We conducted an All Adjudication training for our converted limited duration adjusters to permanent adjuster positions. This training covered all issues and was completed during this quarter and is then followed up with mentoring from our supervisors to ensure quality work. This training then allows our converted permanent adjusters to work on timely issues/all issues, which will prevent the timely issues being added to our backlog issues. The All Adjudication training consisted of 17 days of training during this quarter. We continued our internal BTQ training during this quarter with our supervisors by having them perform live BTQs in their weekly meetings with each other, this promotes consistency amongst the teams and opens up discussions. Internal BTQs are being checked by UI Performs and feedback meeting provided to ensure understanding and consistency with our internal BTQs. This ongoing training allows our supervisors to learn together as a team. The feedback provided to our staff on their cases from our supervisors through the internal BTQs will allow adjusters to be more efficient as it will help with the Quality of cases. This will continue to help determine where trainings are needed with our staff. FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023): When our limited duration adjusters who were on phone full-time were released from phone duty during this quarter, they were trained on specific issues to bring these high queue issues down. They received training on 24(b) issues, late response issues, late appeal issues, and reporting requirement issues, which all queues were reduced pending issues by an average of 75%. These trainings were then followed up with mentoring and reviewing of cases by our supervisory staff to ensure quality of work. We continued during this quarter with the training for all contact center supervisory staff with UI Performs supervisors scheduled to ensure consistency and continuous learning for contact center supervisory staff. Internal BTQs help us determine where training is needed and will allow adjusters to be more efficient as it will help with the Quality of cases. This will continue to help determine where trainings are needed with our staff. FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023): FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023): FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024): FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024): FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
5. (Enter next milestone here)	Completion Date
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022): FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023): FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023): FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023): FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023): FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024): FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024): FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
6. (Enter next milestone here)	Completion Date
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022): FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023): FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023): FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023): FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023): FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024): FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024): FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	

7. (Enter next milestone here)	Completion Date
FY 2023 Quarter 1 Status Report (Quarter Ending 12/31/2022): FY 2023 Quarter 2 Status Report (Quarter Ending 3/31/2023): FY 2023 Quarter 3 status report (Quarter Ending 6/30/2023): FY 2023 Quarter 4 Status Report (Quarter Ending 9/30/2023): FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023): FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024): FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024): FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	

Higher Authority Appeals Promptness							
Federal Fiscal Year: 2023-2024 SCJP Corrective Action Plan & Progress Report					Back to Alternate Overview 2024		
State: Massachusetts							
Federal Fiscal Year 2024							
Performance Measures	ALP	GAP Based on 04/30/2022 - 09/30/2023 Performance	State's Target/Actual Promptness	12/31/2023 Quarter 1	3/31/2024 Quarter 2	6/30/2024 Quarter 3	9/30/2024 Quarter 4
Average Age of Pending Higher Authority Appeals	≤ 40 days	92.00	Target Actual	75.0	60.0	50.0	40.0
Regional Office Comments in cell below:							
Corrective Action Plan Summary							
The Summary must provide:							
Alternate Year Plan Updates							
A. The Reason for the deficiency: The deficiency in meeting the timeliness standard is the result of two factors. First, the large number of PUA appeals received as a result of the COVID pandemic (for example - during the height of the pandemic the Board was receiving over 600 PUA appeals every month), and secondly, beginning in June 2022, the Board has experienced a substantial increase in the number of regular UI appeals received during that time period. This is because the DUA Hearings Department is working through the backlog they had accumulated in both PUA and Regular UI appeals.							
Alternate Year Plan Updates							
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities, aka, Milestones, include: IT requirements, business process analysis, training, improving process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. We have already identified and triaged our target oldest cases, and have begun to assign them to our Case Disposition Team consisting of Board Counsel and three Staff Attorneys. Cases have been and will be assigned to these individuals based on issue type and difficulty of the case. In addition, we have shifted casework to allow for our other staff attorneys to continue working on the review and disposition of their oldest cases. Our Case Disposition team will meet weekly moving forward to measure the success of the team, and to review status of currently assigned cases, and to be assigned new cases. On an ongoing basis, the Board Counsel and Board Members will provide assistance and any necessary specialized legal training so that these cases can be reviewed expeditiously.							
Alternate Year Plan Updates							
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the No prior plan was in place.							
Alternate Year Plan Updates							
D. A brief description of plans for monitoring and assessing achievement of planned actions and for controlling quality after achieving performance goals. Initially, the Board will identify and triage all cases with an age over 100 days, and create a case disposition team led by the Board Counsel to review and dispose of these cases as expeditiously as possible. We will also allocate time for other staff attorneys to clear out their personal backlogs and dispose of their oldest cases.							
Alternate Year Plan Updates							
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the (Enter Remaining Major Actions Here)							
Milestones							
1. Reduce our average time/lapse age of open cases from 92 to 75 by Quarter 1 and incrementally thereafter by triaging and disposing of open cases.							Completion Date 12/31/2023
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
2. Reduce our average time/lapse age of open cases from 75 to 60 by Quarter 2 and incrementally thereafter by continuing to triage and dispose of open cases.							Completion Date 3/31/2024
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							

3. (Enter next milestone here)	Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
4. (Enter next milestone here)	Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
5. (Enter next milestone here)	Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	
6. (Enter next milestone here)	Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	

7. (Enter next milestone here)	Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	

Higher Authority Appeals Promptness							
Federal Fiscal Year: 2023-2024 SCJP Corrective Action Plan & Progress Report					Back to Alternate Overview 2024		
State: Massachusetts					Federal Fiscal Year: 2024		
Performance Measures	ALP	CAP Based on 04/01/2022 - 03/31/2023 Performance	State's Target/Actual Performance	12/31/2023 Quarter 1	3/31/2024 Quarter 2	6/30/2024 Quarter 3	9/30/2024 Quarter 4
Average Age of Pending Higher Authority Appeals	≤ 40 days	92.00	Target 75.0 Actual	75.0	80.0	50.0	40.0
Regional Office Comments in cell below:							
Corrective Action Plan Summary							
The Summary must provide:							
Alternate Year Plan Updates							
A. The Reason for the deficiency. The deficiency in meeting the timeliness standard is the result of two factors. First, the large number of PUA appeals received as a result of the COVID pandemic (for example - during the height of the pandemic the Board was receiving over 600 PUA appeals every month), and secondly, beginning in June 2022, the Board has experienced a substantial increase in the number of regular UI appeals received during that time period. This is because the DUA Hearings Department is working through the backlog they had accumulated in both PUA and Regular UI appeals.							
Alternate Year Plan Updates							
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities, aka, Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. We have already identified and triaged our target oldest cases, and have begun to assign them to our Case Disposition Team consisting of Board Counsel and three Staff Attorneys. Cases have been and will be assigned to these individuals based on issue type and difficulty of the case. In addition, we have shifted casework to allow for our other staff attorneys to continue working on the review and disposition of their oldest cases. Our Case Disposition team will meet weekly moving forward to measure the success of the team, and to review status of currently assigned cases, and to be assigned new cases. On an ongoing basis, the Board Counsel and Board Member will provide assistance and any necessary specialized legal training so that these cases can be review expeditiously.							
Alternate Year Plan Updates							
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the plan was in place. No prior plan was in place.							
Alternate Year Plan Updates							
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. Initially, the Board will identify and triage all cases with an age over 100 days, and create a case disposition team led by the Board Counsel to review and dispose of these cases as expeditiously as possible. We will also allot writing time for other staff attorneys to clear out their personal backlogs and dispose of their older cases.							
Alternate Year Plan Updates							
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance ☐ (Enter Remaining Major Actions Here)							
Milestones							
1. Reduce our average timelapse age of open cases from 92 to 75 by Quarter 1 and incrementally thereafter by triaging and disposing of open cases.							Completion Date 12/31/2023
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
2. Reduce our average timelapse age of open cases from 75 to 60 by Quarter 2 and incrementally thereafter by continuing to triage and dispose of open cases.							Completion Date 3/31/2024
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
3. (Enter next milestone here)							Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
4. (Enter next milestone here)							Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
5. (Enter next milestone here)							Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
6. (Enter next milestone here)							Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
7. (Enter next milestone here)							Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							

Higher Authority Appeals Promptness						
Federal Fiscal Year: 2023-2024: SCJP Connective Action Plan & Progress Report					Back to Atlanta Overview 2024	
State of Kansas: 2023					Federal Fiscal Year: 2024	
Performance Measures	ALP	Q1P Based on: 06/01/2022 - 08/31/2023 Performance	Score: 92.00	Score: 75.6	Score: 63.0	Score: 50.0
		Target: 92.00	Target: 75.6	Target: 63.0	Target: 50.0	Target: 40.0
Average Age of Pending Higher Authority Appeals	≤ 60 days	92.00	75.6	63.0	50.0	40.0
Regional Office Comments in cell below:						
Corrective Action Plan Summary						
The Summary must provide:						
Alternative Year Plan Updates: A. The Reason for the Deficiency: The deficiency in meeting the timeline standard is the result of two factors. First, the large number of HAA appeals received as a result of the COVID pandemic (for example - during the height of the pandemic the Board was receiving over 500 HAA appeals every month), and secondly, beginning in June 2022, the Board has experienced a substantial increase in the number of regular (i.e. appeals received during that time period). This is because the OIA Hearings Department is working through the backlog they had accumulated in both PUA and Regular appeals. Alternative Year Plan Updates: B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities (i.e., Milestones, include IT requirements, business process analysis, training, implementing process improvements, measuring effectiveness, etc.). Please include a description of these activities/performance in each stage of your "Plan-Do-Check-Act" corrective action plan: We have already identified and triaged our backlog of cases, and have begun to assign them to our Case Disposition Team consisting of Board Counsel and three Staff Attorneys. Cases have been and will be assigned to these individuals based on issue type and difficulty of the case. In addition, we have shifted casework to allow for our other staff attorneys to continue working on the review and disposition of their oldest cases. Our Case Disposition team will meet weekly moving forward to measure the success of the team, and to review status of currently assigned cases, and to be assigned new cases. On an ongoing basis, the Board Counsel and Board Members will provide assistance and any necessary specialized legal training so that these cases can be reviewed expeditiously. Alternative Year Plan Updates: C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance, and, an explanation of why the new plan was right: Alternative Year Plan Updates: D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. Initially, the Board will identify and triage all cases with an age over 180 days, and create a case disposition team led by the Board Counsel to review and dispose of these cases as expeditiously as possible. We will also work with time for other staff attorneys to clear out their personal backlogs and dispose of their older cases. Alternative Year Plan Updates: NOTE: Enter an "X" in the box to the right of the desired improvement(s) will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the performance ☐ Enter Remaining Major Actions Here						
Milestones						
						Completion Date
1. Reduce the average disposition age of open cases from 92 to 75 by Quarter 3 and increase steadily thereafter by triaging and disposing of open cases.						12/31/2023
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):						
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):						
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):						
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):						
2. Reduce the average disposition age of open cases from 75 to 60 by Quarter 2 and incrementally thereafter by continuing to triage and dispose of open cases.						Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):						9/31/2024
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):						
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):						
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):						
3. ☐ (Enter next milestone here)						Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):						
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):						
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):						
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):						
4. ☐ (Enter next milestone here)						Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):						
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):						
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):						
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):						
5. ☐ (Enter next milestone here)						Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):						
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):						
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):						
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):						
6. ☐ (Enter next milestone here)						Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):						
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):						
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):						
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):						
7. ☐ (Enter next milestone here)						Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):						
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):						
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):						
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):						

Higher Authority Appeals Promptness							
Federal Fiscal Year: 2023-2024 SQSP Corrective Action Plan & Progress Report					Back to Alternate Overview 2024		
State: Massachusetts					Federal Fiscal Year 2024		
Performance Measures	ALP	GSP Based on 04/30/2022 - 09/30/2023 Performance	State's Target/Actual Performance	12/31/2023 Quarter 4	3/31/2024 Quarter 1	6/30/2024 Quarter 2	9/30/2024 Quarter 3
Average Age of Pending Higher Authority Appeals	≤ 40 days	92.00	Target Actual	75.0	60.0	50.0	40.0
Regional Office Comments in cell below:							
Corrective Action Plan Summary							
The Summary must provide:							
Alternate Year Plan Updates							
A. The Reason for the deficiency. The deficiency in meeting the time case standard is the result of two factors. First, the large number of PUA appeals received as a result of the COVID pandemic (for example... during the height of the pandemic the Board was receiving over 600 PUA appeals every month), and secondly, beginning in June 2022, the Board has experienced a substantial increase in the number of regular UI appeals received during that time period. This is because the DUA Hearings Department is working through the backlog they had accumulated in both PUA and Regular UI appeals.							
Alternate Year Plan Updates							
B. Provide a description of your "Plan-Do-Check-Act" corrective action plan which will be undertaken to achieve the acceptable level of performance. Examples of major actions and activities, aka, Milestones, include IT requirements, business process analysis, training, improving meeting process improvements, measuring effectiveness, etc. Please include a description of these actions/activities in each stage of your "Plan-Do-Check-Act" corrective action plan. We have already identified and tagged our target oldest cases, and have begun to assign them to our Case Disposition Team consisting of Board Counsel and three Staff Attorneys. Cases have been and will be assigned to these individuals based on issue type and difficulty of the case. In addition, we have shifted casework to allow for our other staff attorneys to continue working on the review and disposition of their oldest cases. Our Case Disposition team will meet weekly moving forward to measure the success of the team, and to review status of currently assigned cases, and to be assigned new cases. On an ongoing basis, the Board Counsel and Board Members will provide assistance and any necessary specialized legal training so that these cases can be reviewed expeditiously.							
Alternate Year Plan Updates							
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the No prior plan was in place.							
Alternate Year Plan Updates							
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. Initially, the Board will identify and tag all cases with an age over 100 days, and create a case-disposition team and by the Board Counsel to review and dispose of these cases as expeditiously as possible. We will also allot writing time for other staff attorneys to clear out their personal backlogs and dispose of their older cases.							
Alternate Year Plan Updates							
NOTE: Enter an "X" in the box to the right if the desired improvements will not be accomplished by the end of the two consecutive fiscal years for which this plan is in effect. Summarize, below, the major actions remaining to be taken in subsequent fiscal years and include a projected completion date as to when the (Enter Remaining Major Actions Here)							
Milestones							
1. Reduce our average timecase age of open cases from 92 to 75 by Quarter 1 and incrementally thereafter by triaging and disposing of open cases.							Completion Date 12/31/2023
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
2. Reduce our average timecase age of open cases from 75 to 60 by Quarter 2 and incrementally thereafter by continuing to triage and dispose of open cases.							Completion Date 3/31/2024
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
3. (Enter next milestone here)							Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
4. (Enter next milestone here)							Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
5. (Enter next milestone here)							Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
6. (Enter next milestone here)							Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):							
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							

7. (Enter next milestone here)	Completion Date
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):	
FY 2024 Quarter 2 Status Report (Quarter Ending 3/31/2024):	
FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):	
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):	

Higher Authority Appeals Promptness							
Federal Fiscal Year: 2023-2024 SQSP Corrective Action Plan & Progress Report					Back to Alternate Overview 2024		
State: Massachusetts					Federal Fiscal Year 2024		
Performance Measures	ALP	QSP Based on 04/30/2023 - 09/30/2023 Performance	State's Target/Fiscal Performance	12/31/2023 Quarter 1	3/31/2024 Quarter 2	6/30/2024 Quarter 3	9/30/2024 Quarter 4
Average Age of Pending Higher Authority Appeals	≤ 40 days	92.00	Target	75.0	60.0	50.0	40.0
Actual							
Regional Office Comments in cell below:							
Corrective Action Plan Summary							
The Summary must provide:							
Alternate Year Plan Updates:							
A. The Reason for the deficiency. The deficiency in meeting the time case standard is the result of two factors. First, the large number of PUA appeals received as a result of the COVID pandemic (for example - during the height of the pandemic the Board was receiving over 600 PUA appeals every month), and secondly, beginning in June 2022, the Board has experienced a substantial increase in the number of regular UI appeals received during that time period. This is because the DUA Hearings Department is working through the backlog they had accumulated in both PUA and Regular UI appeals.							
Alternate Year Plan Updates:							
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Alternate Year Plan Updates:							
C. If a plan was in place the previous year, an explanation of why the actions contained in that plan were not successful in improving performance; and, an explanation of why the No plan was in place.							
Alternate Year Plan Updates:							
D. A brief description of plans for monitoring and assessing accomplishment of planned actions and for controlling quality after achieving performance goals. Initially, the Board will identify and triage all cases with an age over 100 days, and create a case disposition team led by the Board Counsel to review and dispose of these cases as expeditiously as possible. We will also allot writing time for other staff attorneys to clear out their personal backlogs and dispose of their older cases.							
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FY 2024 Quarter 3 Status Report (Quarter Ending 6/30/2024):							
FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
2. Reduce our average time/case age of open cases from 75 to 60 by Quarter 2 and incrementally thereafter by continuing to triage and dispose of open cases.							Completion Date
							3/31/2024
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
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Higher Authority Appeals Promptness							
Federal Fiscal Year: 2023-2024 S2SP Corrective Action Plan & Progress Report					Back to Alternate Overview 2024		
State: Massachusetts					Federal Fiscal Year 2024		
Performance Measures	ALP	QAP Based on 04/01/2022 - 03/31/2023 Performance	State's Target/Actual Performance	12/31/2023 Quarter 1	3/31/2024 Quarter 2	6/30/2024 Quarter 3	9/30/2024 Quarter 4
Average Age of Pending Higher Authority Appeals	≤ 40 days	92.00	Target Actual	75.0 60.0	60.0 50.0	50.0 40.0	40.0
Regional Office Comments in cell below:							
Corrective Action Plan Summary							
The Summary must provide:							
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FY 2024 Quarter 4 Status Report (Quarter Ending 9/30/2024):							
2. Reduce our average timeline age of open cases from 75 to 60 by Quarter 2 and incrementally thereafter by continuing to triage and dispose of open cases.							Completion Date 3/31/2024
FY 2024 Quarter 1 Status Report (Quarter Ending 12/31/2023):							
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Higher Authority Appeals Promptness							
Federal Fiscal Year: 2023-2024 SQSP Corrective Action Plan & Progress Report					Back to Affirmative Overview 2024		
State: Massachusetts					Federal Fiscal Year: 2024		
Performance Measures	ALP	QSP Based on 04/01/2022 - 03/31/2023 Performance	State's Target/Actual Performance	12/31/2023 Quarter 1	3/31/2024 Quarter 2	6/30/2024 Quarter 3	9/30/2024 Quarter 4
Average Age of Pending Higher Authority Appeals	≤ 40 days	92.00	Target: 75.0 Actual:	75.0	60.0	50.0	40.0
Regional Office Comments in cell below:							
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Attachment H4
State Quality Service Plan (SQSP)
Integrity Action Plan (IAP)

Massachusetts – Fiscal Year (FY) 2024

Accountable Agency Official(s).

List the person or persons accountable for ensuring integrity in the state’s unemployment insurance (UI) program.

Name: Katie Dishnica

Title: UI Director

Email: Katie.Dishnica@mass.gov

Phone: (617) 626-5132

***Note:** Unemployment Insurance Program Letter (UIPL) No. 09-23, dol.gov/agencies/eta/advisories/UIPL0923 issued on June 30, 2023, makes reference to UIPL No. 22-21, Change 2, throughout the guidance. However, on July 13, 2023, the Employment and Training Administration (ETA) issued UIPL No. 10-23, dol.gov/agencies/eta/advisories/uipl-10-23 which rescinded UIPL No. 22-21, Change 2 UIPL No. 11-23, dol.gov/agencies/eta/advisories/uipl-11-23 also issued on July 13, 2023, changed the amount of the integrity grant funding originally issued under UIPL No. 22-21, Change 2, but maintained the guidance on required and recommended fraud prevention and detection and overpayment recovery activities.

- **(Topic #1: National Priority) – Ensuring UI program integrity by assessing and evaluating fraud risks, implementing, and maintaining sufficient controls to effectively mitigate the likelihood and impact of fraud, and reducing improper payments.**

MDUA has been in the process of assessing all their current systems and processes as part of our benefits modernization. As we work through design and predevelopment of our new UI benefits system, which will launch early 2025, we still need to weigh how to address the continued attacks against MA UI systems. We know several of our current concerns will be addressed with modernization, but MDUA still needs to be proactive and vigilant. MDUA continues to have to balance.

Currently, MDUA uses several fraud detection systems to identify potential fraudulent UI activities. These systems use fraud analytics and compare claim submissions and UI account updates to other nationwide UI records and public databases. While these systems are integrated for initial claims the additional flags these occur are not currently integrated and require manual staff review.

MDUA will use recently awarded grant funding under UIPL 11-23 (pending final proposal approval) to remedy this by integrating these as well as adding an additional secondary verification during the initial claims process.

MDUA also engages a PL consultant who reviews and analyzes data and provides weekly analysis and reporting. This consultant works with both the agency and other state agencies to

provide data and analysis related to Program Integrity and fraud. MDUA also plans to use UIPL 11-23 funding to hire staff to assist in this analysis and to assist the consultant and the Program Integrity unit in the review of any findings or trends that result from this work.

- In evaluating fraud risks, states should consider both eligibility fraud risks and identity (ID) fraud risks.
- o **State plans to evaluate UI fraud risks and implement and maintain sufficient controls to effectively prevent fraud and reduce improper payments, including state actions to develop their own state-specific antifraud strategy.**

Program Integrity is responsible for fraud risk management. Currently, MA DUA uses several fraud detection systems to identify potential fraudulent UI activities. These systems use fraud analytics and compare claim submissions and UI account updates to other nationwide UI records and public databases. While these systems are integrated for initial claims the additional flags these occur are not currently integrated and require manual staff review.

MDUA recently received the NOA for funds associated with *UIPL 22-21* and plans to utilize those funds to improve current fraud detection methods and add an additional layer of ID verification during the initial claims process.

MDUA will also implement Login.gov and USPS ID proofing solution as recommended in *UIPL 22-21*. This will replace our current ID proofing and allow equity and access to constituents providing access to all participating USPS locations as compared to the very limited in-person MDUA locations. MDUA has already commenced design and technical meetings with necessary parties to implement [Login.gov/USPS](https://login.gov/) in the current UI system. MDUA had identified these enhancements prior to the notice of this award as part of a current strategy to augment current antifraud strategy. As part of the initial submission for this NOA award, MDUA researched and began preliminary design of these solutions. MDUA hopes to implement these solutions by the end of 1st QTR 2024 dependent on notice of final award for the grant and technical resources to test and implement the solutions.

MDUA uses our state website to provide messaging and information regarding current fraud trends which could affect any UI interested parties and actively engage with other agencies and offices to provide information and guidance on how to service and support any constituents who PII has been used associated with UI account or other claim activities.

Program Integrity has been working with claim, adjudication, hearings to provide fraud specific guidance and training to these units and provide better communication regarding ongoing fraud trends and findings for MA and other states.

- o Key elements of an antifraud strategy include:
 - **Who** is responsible for fraud risk management activities?

- Establish roles and responsibilities of those involved in fraud risk management activities, such as the antifraud entity and external parties responsible for fraud controls and communicate the role of the Office of Inspector General (OIG) to investigate potential fraud.
- **What** is the program doing to manage fraud risk?
 - Describe the program’s activities for preventing, detecting, and responding to fraud, as well as monitoring and evaluation.
- **When** is the program implementing fraud risk management activities?
 - Create timelines for implementing fraud risk management activities, as appropriate, including monitoring and evaluations.
- **Where** is the program focusing its fraud risk management activities?
 - Demonstrate links to the highest internal and external residual fraud risks outlined in the fraud risk profile.
- **Why** is fraud risk management important?
 - Communicate the antifraud strategy to employees and other stakeholders, and link antifraud efforts to other risk management activities, if any.
- See *A Framework for Managing Fraud Risks in Federal Programs* at gao.gov/assets/gao-15-593sp.pdf for additional information.
- **State use of tools, services, strategies, process improvements, and/or procedural changes adopted by the state to combat fraud, verify identities, and enhance recovery efforts. States must identify which tools, solutions, and service provider(s) are used in the state’s fraud management operations, including but not limited, to the following areas: data analysis, risk-based ID verification, fraud prevention and detection, and cybersecurity.**

MDUA has used a layered approach to identification verification. As such we utilize multiple tools to achieve accurate and efficient determinations on all claims FIVS: Fast Identification Verification System (FIVS) is a data analytic tool and case management system which allows MDUA to verify identities of UI applicants. This tool allows us to produce an identification score for each UI applicant allowing us (and the claimant) a way to verify who they are. The outcome file for FIVS involves placing individual claims in one of three buckets. The first group of claimants are the “pass” claimants. This group of claimants do not need to do anything else to establish their identity. As long as their UI application is otherwise eligible, they will receive payment for any weeks certified in UI Online. The second group of people have notable fraud scores which lead us to still question. This group will receive a letter via their correspondence preference requesting they complete the ID.me process. The last group FIVS sends us are the UI applicants who score so badly with their fraud score an ineligible/disqualified determination is sent to them. In this type of situation, the only recourse for the applicants to proceed with their application is to appeal the determination.

- Lexis Nexis (Accurant): The Lexis Nexis Accurant product allows Program Integrity staff to manually establish a person identity. This on demand information allows the investigator to establish a digital data identity for UI applicants.
 - ID.me: [ID.me](#) is a USDOL approved vendor product which allows a UI applicant the opportunity to establish their identity if MDUA has cause for concern. A UI applicant registers and participates in the ID.me process to receive a pass score which gets transmitted back to UI for issue resolution. If an applicant isn't able to receive a pass result or doesn't participate in the ID.me process, they will be denied benefits after a 14-day period.
 - SSA cross match maintenance: MDUA utilized data from the Social Security Administration in order to verify UI applicants when filing an initial claim. This effort is an automated process using in part a person's SSN, name, and date of birth.
 - IDH: The Integrity Data Hub (IDH) is a USDOL initiative via NASWA to share data among states in an effort to reduce the improper payment rate, specifically fraud related overpayments.
 - UI application changes to incorporate MFA and Google ReCAPTCHA
 - A dedicated vendor to analyze improper payment data to ensure senior management has the information needed to be impactful.
 - MDUA is actively working with financial institutions and the OIG to pursue people who commit identification fraud.
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- o Include strategies, solutions, and/or activities using funds the Department has made available to states for combatting fraud and strengthening UI program integrity under *UIPL Numbers*: [28-20](#); [dol.gov/agencies/eta/advisories/unemployment-insurance-program-letter-no-28-20 28-20, Change 1](#); [dol.gov/agencies/eta/advisories/unemployment-insurance-program-letter-no-28-20-change-1 28-20, Change 2](#); [dol.gov/agencies/eta/advisories/unemployment-insurance-program-letter-no-28-20-change-2 28-20, Change 4](#); [dol.gov/agencies/eta/advisories/uipl-no-28-20-change-4 22-21](#); [dol.gov/agencies/eta/advisories/unemployment-insurance-program-letter-no-22-21 11-23](#); [dol.gov/agencies/eta/advisories/uipl-11-23](#) and [02-22](#). [dol.gov/agencies/eta/advisories/unemployment-insurance-program-letter-no-02-22](#)
 - o Provide details on overpayment recovery efforts including:
 - Actions with banks, financial institutions, and with Federal law enforcement's forfeiture and seizure efforts.
 - Information on how the state is using waivers of recovery of overpayments both for regular UI and temporary UC programs created by the CARES Act, including if the state is using approved blanket waivers as described in [UIPL No. 20-21, Change 1](#). [dol.gov/agencies/eta/advisories/unemployment-insurance-program-letter-no-20-21-change-1](#)
 - How the state is using the Treasury Offset Program (TOP) for benefit overpayment recovery, how the state is ensuring covered debts are being submitted, and any barriers/challenges in working with TOP.
 - o **State use of UI Integrity Center resources, with a particular focus on state connection to the Integrity Data Hub (IDH) and use of its datasets to cross-match unemployment**

compensation (UC) claims and aid in the prevention and detection of fraud and improper payments (see [Training and Employment Notice \(TEN\) No. 24-21](https://www.dol.gov/agencies/eta/advisories/training-and-employment-notice-no-24-21)); [dol.gov/agencies/eta/advisories/training-and-employment-notice-no-24-21](https://www.dol.gov/agencies/eta/advisories/training-and-employment-notice-no-24-21)

MDUA has utilized the IDH and its available functionality. In August of 2023, MDUA had IDH representative come for an on-site visit to work with Program Integrity staff to assess MDUA current use of the IDH and how MA DUA and better utilize the IDH and its services. MDUA also discussed how to better leverage the IDH and other services as we finalize designs for benefits modernization. While MDUA was working well with the IDH and its service the visit identified a few points where MDUA could make adjustments in order to better leverage the IDH. Since this on-site visit MDUA has been better able to utilize all IDH functionality increasing our fraud reporting efforts, our use of SAR, BAV, MSCM and other IDH tools. And has increased contributions to the fraud alert and reporting in Alerts 2.0.

Additionally, MDUA has reviewed its current data and claim submissions to the IDH and plans to adjust current reporting parameters to transmit additional data from all points of the claim process, including additional and continued claim records. MDUA also plans to integrate the IDH into our current system to streamline the current manual processes being used to flag potential fraudulent claim records.

- o Discuss the state's connection to the IDH, including frequency of IDH use.
 - Does the state submit all initial and continued claims for IDH cross-matching?
If not, what is preventing the state from sending all claims?
- o If the state is not connected to the IDH and/or is connected but not regularly submitting UI claims data through a webservice/real-time connection to IDH, provide details on the state's plan for how to increase usage and an anticipated timeline to:
 - Connect to the IDH.
 - Increase frequency of IDH use.
 - Fully leverage all available IDH capabilities. IDH capabilities include:
 - Suspicious Actor Repository (SAR)
 - Multi-State Cross-Match (MSCM)
 - Identity Verification (IDV)
 - Bank Account Verification (BAV)
 - Fraud Alerting
 - Foreign Internet Protocol (IP) Address Detection
 - Suspicious Email Domains and Patterns
 - Update the IDH connection to a webservice/real-time connection.
 - Identify barriers to using any of the available IDH capabilities.
- o If the state has not executed IDH Participation Agreement - Version 5.0 (see [TEN No. 24-21](https://www.dol.gov/agencies/eta/advisories/training-and-employment-notice-no-24-21)), ([dol.gov/agencies/eta/advisories/training-and-employment-notice-no-24-21](https://www.dol.gov/agencies/eta/advisories/training-and-employment-notice-no-24-21)) provide details on the anticipated timeline to update to *IDH Participation Agreement – Version 5.0*.

- o Discuss the state's use of the UI National Integrity Academy's virtual trainings and/or eLearning lessons.
- o Discuss the state's use of UI Integrity Knowledge Exchange Library resources, including the Behavioral Insights Toolkit (see TEN No. 15-21).
(https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=6799)
- o Discuss the state's participation in State Consultative Services.

Note: The IDH Team has a one-page dashboard report for each state summarizing current IDH utilization and areas where IDH use might be expanded. Please reach out to IDHTeam@naswa.org to request a copy of your state's IDH utilization dashboard report.

- o **State use of required and recommended integrity controls and overpayment recovery activities as outlined in UIPL No. 11-23, dol.gov/agencies/eta/advisories/uipl-11-23 including any additional effective cross-matching and overpayment recovery activities and identified best practices.**

MDUA uses multiple cross-matches in the through the UI claims process. All claims are run through SSA for initial authentication. Each UI online log in requires users to go through multi-factor authentication. Additionally, MDUA utilizes several fraud detection software and programs. Each initial claim is reviewed and analyzed for potential fraud markers or other suspicious data. Each claim is scored, and the results of this scoring will determine if the claim is flagged for further investigation. This software also tracks and flags certain changes to the associated claim and flags subsequent suspicious activities for review. As previously mentioned MDUA utilizes the IDH and its services including SAR, BAV, MSCM and other IDH tools.

MDUA utilizes many crossmatches including NDNH, SDNH and quarterly crossmatches to detect potential incidents of improper payments. Non-citizen claimants verify their work authorization through SAVE. MDUA is in the final stages of implementing PUPs and currently crossmatches monthly state and local incarceration reports against current UI claim records.

- MDUA participates in all state and federal offset agreements. And works with local, state, and federal offices to refer potential cases and provide any needed support for pending cases. MDUA applies penalties and interest for overpayments determined to be fraud for which the claimant is truly at fault (not ID theft related). MDUA utilizes the following recovery activities; Benefit Offsets, Treasury Offset Program (TOP), Cross Program Offset Recovery Agreement (CPORA), Interstate Reciprocal Offset Recovery Arrangement (IPORA), Civil Actions, and non-fraud payment plans.
- o Provide details regarding the state's use of each cross-match/integrity control and overpayment recovery activity (required and recommended) as outlined in UIPL No. 11-23. (dol.gov/agencies/eta/advisories/uipl-11-23) Include details on the frequency of crossmatch/integrity controls use (e.g., conducted on all initial claims, all continued claims, only when suspicious activity is identified?) and frequency of overpayment recovery activities.
- o Cross-matches/integrity controls and recovery activities include:

Cross-matches/Integrity Controls

- ID Verification;
- National Directory of New Hires (NDNH);
- Quarterly Wage Records Cross-match;
- Systematic Alien Verification for Entitlement (SAVE);
- Referral of allegations reasonably believed to constitute UC fraud, waste, abuse, mismanagement, or misconduct to DOL-OIG;
- UI Integrity Center's IDH;
- Digital Authentication, such as Multifactor Authentication (MFA);
- Device Fingerprint/Reputation Management;
- Fraud Risk Scoring (i.e., Case Management Prioritization);
- Comparisons and cross-matches that detect shared characteristics;
- Social Security Administration cross-matches (i.e., Unemployment Insurance Query (UIQ), Prisoner Update Processing System (PUPS), Death Master File);
- Federal, state, and local incarceration cross-matches;
- Deceased Records cross-matches;
- Vital Statistics cross-matches;
- State Directory of New Hires (SDNH);
- Department of Motor Vehicle cross-match;
- Interstate Benefits (IB) cross-match;
- State Identification Inquiry (SID) and IB8606 enhancements made to the Interstate Connection (ICON) network cross-match to prevent concurrent claim filing in multiple states;
- Use of a unique identifier to identify claimants instead of using the full SSN;
- Fictitious employer cross-matches;
- Periodic IT security assessments and audits consistent with National Institute of Standards and Technology (NIST)-compliant information technology security guidelines;
- Adequate internal controls to protect the integrity and security of state assets;
- Implement a cross-functional integrity task force to develop and implement state-specific action plans to reduce UI improper payments.

Overpayment Recovery Activities

- Benefit Offsets;
- TOP;
- Cross Program Offset Recovery Agreement (CPORA);
- Interstate Reciprocal Offset Recovery Arrangement (IPORA);
- Negotiating repayment plans;
- Accepting repayments through various methods (e.g., online, via debit/credit card);
- State Income Tax Offset Program;
- Wage garnishments;
- Property liens and assessments;
- Offsets of lottery winnings, homestead exemptions, and other benefits;

- Active participation in probate and/or bankruptcy proceedings;
 - Skip tracing;
 - Work proactively and collaboratively with banks and financial institutions;
 - Civil actions;
 - Credit bureau referrals;
 - State/federal prosecution;
 - Penalties and interest on overpayments in compliance with state and federal law;
 - Collection agency referrals;
 - Implementing a voluntary fraud self-disclosure program;
 - Other recovery methods as determined by state law or policy.
- o Identify any additional integrity controls or recovery activities the state uses that are not listed in UIPL No. 11-23. (dol.gov/agencies/eta/advisories/uipl-11-23)
 - o Provide promising practices.
 - o Identify challenges with cross-matches or in overpayment recovery activities.
 - o If the state does not currently use one of the integrity controls or recovery activities listed in UIPL No. 11-23, (dol.gov/agencies/eta/advisories/uipl-11-23) provide the state's plan and anticipated timeline to request and obtain access to the cross-match/integrity control or to implement the overpayment recovery activity.

Note: If the state does not plan to obtain access to a crossmatch/integrity control or implement a specific recovery activity, please explain.

- o **State use and employer participation in State Information Data Exchange System (SIDES) (see TEN No. 12-16). (dol.gov/agencies/eta/advisories/training-and-employment-notice-no-12-16)**

NA – MA does not participate in SIDES

- Provide details on the state's current usage of SIDES.
- If the state does not currently use all available SIDES exchanges, provide the state's plan for how to connect to all SIDES exchanges and an anticipated timeline to implement each SIDES exchange. Sides Exchanges include:
 - Separation Information
 - Monetary and Potential Charges
 - Additional Fact-Finding
 - Determinations and Decisions
 - Earnings Verification
 - Benefit Charges
- Identify any barriers to SIDES exchange participation, either in state promotion or in employer adoption.

- o **State strategies designed to facilitate claimants' compliance with state work search requirements while also supporting their reemployment such as adoption of the work search requirements in the Model Work Search Legislation (see TEN No. 17-19). (dol.gov/agencies/eta/advisories/training-and-employment-notice-no-17-19)**
- MDUA work search criteria include activities which will enhance a recipient's rapid reemployment as outlined in UIPL 17-19. Our work search criteria includes;
- Registering for work and reemployment services with a Career Center
- Completing a job application in person or online with employers who may reasonably be expected to have openings for suitable work
- Mailing a job application and/or resume, as instructed in a public job notice
- Making in-person visits with employers who may reasonably be expected to have openings
- Sending job applications to employers who may reasonably be expected to have openings for suitable work
- Interviewing with potential employers in person or by telephone
- Registering for work with private employment agencies or placement services
- Using the employment resources available at MassHire Career Centers that may lead directly to obtaining employment, such as:
- Obtaining and using local labor market information
- Participating in skills assessments for occupation matching
- Participating in instructional workshops
- Obtaining and following up on job referrals from the Career Center
- Attending job search seminars, career networking meetings, job fairs, or employment-related workshops that offer instruction in improving individuals' skills for obtaining employment
- Using online job matching systems, including the Massachusetts One-Stop Employment System (MOSES)
- Reporting to the Union Hall, if this is your primary work search method
- Using other job search activities such as reviewing job listings on the internet, newspapers, or professional journals, contacting professional associations, networking with colleagues or friends
 - Outline the state's work search requirement and explain state challenges with work search improper payments.
 - Discuss the state's plan to improve work search compliance by reducing work search errors and strengthening reemployment.
- **(Topic #2) – State plans and actions to address the state's top three improper payment root causes in Payment Integrity Information Act (PIIA) 2022.**

The top three root causes for overpayments are benefit year earnings, separation issues, and other eligibility issues. As noted in our Improper Payment Measure CAP, our review of the data

tells us these results were a direct result of pandemic unemployment claims. We anticipate as we move away from pandemic claims being counted during the program year the elevated percentages for root cause will continue to decrease. Aside from the pandemic claims, MDUA is hiring a new BPC Director, known here as Director of Program Integrity. Although the selected candidate has a wealth of knowledge in all things Integrity, she will be facing some challenges while transitioning into her new position. Some of these challenges include performing a business review of all things not only in the Program Integrity Department but in all areas of MDUA business impacted by integrity. Our overarching plan is to review all business processes which impact integrity in order to improve all integrity measures. It should be noted here MDUA had performed a UI Integrity Center state intensive service review just prior to the pandemic. Some of the work identified from this review is complete while some is not. We will be reviewing this project to improve performance. The last challenge we have identified has to do with our current project to modernize. The current UI system was implemented in 2013. Since that time, we have learned of the many benefits of taking a more robust approach to integrating integrity solutions into UI system.

- Identify the state's top three improper payment root causes.
 - Explain the state's challenges in reducing improper payments in the top three root cause categories.
 - Discuss the state's plan to reduce improper payments in each root cause category.
- **(Topic #3) – State coordination and collaboration with the DOL-OIG and other state and Federal law enforcement agencies to investigate and prosecute UI fraud and recover overpayments. This should also include state plans to continue providing all confidential UC information to DOL-OIG for purposes of both investigating fraud and performing audits.**

Since the onset of the pandemic in 2020 and the explosion in the filing of unemployment claims that followed, DUA has assisted hundreds of investigations of UI fraud throughout the country at the federal, state, and municipal levels, many of which have led to successful prosecutions. We have coordinated our assistance in many cases with Special Agent Christina Rosen in the Boston field office of the Department of Labor's Office of Inspector General, Office of Investigations (DOL-OIG). Our assistance, which is ongoing, has consisted of providing claim records, as well as information in reports generated by our online systems for regular unemployment benefits and Pandemic Unemployment Assistance. Although the pandemic has ended MDUA continues to work with OIG when needed to provide continued assistance and information for ongoing cases.

- **(Topic #4) – State plans to strengthen program integrity in UI tax operations, including current activities and plans to identify and prevent worker misclassification, State Unemployment Tax Act (SUTA) Dumping, and fictitious employer schemes, and development/use of effective employer audit strategies (i.e., use of remote audits).**

As our modernized revenue system launches, MDUA will strength our UI tax and Revenue operations. Additionally, the launch allows MDUA revenue and wage employees whose time was being split between regular duties and modernization responsibilities to return to regular duties. We understand there will be a learning curve for staff and other interested parties but once this adjustment occurs, these revenue processes will be efficient and streamlined. This new system has been back bridged to the current UI benefits system to flag and mark integrity associated tasks such as fictitious employers. UI revenue has recently appointed an acting Director of Revenue who will also assist in streamlining these processes as we return to normal operations.

- Identify current activities and plans to address:
 - Worker Misclassification
 - SUTA Dumping
 - Fictitious employer schemes
- Development/use of effective employer audit strategies (including, but not limited to, use of remote audits).
- **(Topic #5) – State plans and actions to strengthen internal security and ensure that all appropriate internal controls and processes are in place and are adequate to assess internal risks and threats, ensure program integrity, and minimize program vulnerabilities (see [UIPL No. 14-17](#)).**
https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=5496

This is one area for MDUA which is a shared service provided by our parent, The Executive Office of Labor and Workforce Development (EOLWD). As an example, EOLWD's Internal Control and Investigation Department maintains our Internal Control Plan which follows the framework of the Committee of Sponsoring Organizations' (COSO) Enterprise Risk Management Framework (ERM). Another Department within our Secretariat is the Chief Information and Security Office which is dedicated to monitoring our IT Security efforts. An example of their work is maintaining a firewall for our system, ensuring UI recipients who log into their account go through ReCAPTCHA and multi-factor authentication process.

- **(Topic #6) – State plans and actions to evaluate the effectiveness and equity of fraud prevention and detection, ID verification, and improper payment reduction activities. State should include strategies to ensure that processes used to detect and prevent fraud are effective and do not limit the ability for a legitimate claimant to apply for and become eligible for UC. States implementing or using facial recognition technology in their ID proofing processes must also report findings from bias testing and provide updates on efforts to mitigate biases or barriers in this section of the IAP.**

MDUA continue to work to enhance and improve our identification verification (IDV) process to ensure we capture as many fraudulent claims as possible. However, MA continues to be a target for fraudulent claim activities and has to continually adjust to bad actors and their attempts to obtain UI benefits. These fraudsters will continue to test our business process and

IT infrastructure by changing and improving their methods. The initial ID verification through FIVs is 72 hours or less. If the initial verification (FIVs) fails the application with high markers of fraud, the person is denied benefits and sent a formal ineligibility letter explaining their right to appeal the determination. If the initial verification marks the claim for additional verification through ID.me the person is given 14 days to complete additional verification. If the person fails to complete the additional verification, the person is denied benefits and a formal ineligibility letter explaining their right to appeal the determination. There is no identity verification scenario in which MDUA allows an application to stop without asking for additional information and a right to appeal. MDUA is in an initial design session to implement Login.gov and USPS. Currently, MDUA does not have many in-person locations for claimants or other interested parties to verify. Login.gov and USPS will dramatically increase MDUA's accessibility and provide equity of access in areas previously inaccessible to claimants needing to verify their identity

- Identify potential barriers that are created by fraud prevention and detection functions for legitimate claimants. Provide plans and actions designed to mitigate such risks.
 - As required in UIPL No. 11-23 (dol.gov/agencies/eta/advisories/uipl-11-23), states must ensure there is at least one timely, effective, and accessible non-digital alternative to online ID verification, which should not be overly burdensome on applicants, limit access to public benefits programs or the timely receipt of benefits or stigmatize members of the public in any way. Provide details on the state's non-digital ID verification option(s).
 - Include how the state flags cases for suspected fraudulent activity and how investigation resources are assigned, including:
 - What risk scoring elements and/or prioritization elements are used.
 - How the risk scoring elements and/or prioritization elements are weighted.
 - How the state evaluates the weights based on false positives and negatives.
 - How risk scoring elements and/or prioritization elements are updated.
 - How the state ensures the fraud risk scoring and/or prioritization of cases does not negatively affect legitimate claimants.
 - Include details on how the state measures claimants' usage of both digital and non-digital identity verification options, how the state reviews digital services for false positive and false negatives, and how the state ensures legitimate claimants have alternative paths to prove their identity and/or resolve issues, including providing a possible recourse.
- **(Topic #7) – State plans and actions to mitigate negative consequences for victims of UI ID fraud, including ensuring simplified processes to remove the victim's liability for overpayments resulting from ID fraud.**

During the pandemic MDUA implemented an online method for ID theft victims to report fraudulent UI claim and does not hold these claimants, who are victims, accountable for any associated overpayment marking these debts as “uncollectible”. Additionally, MDUA has taken steps to ensure claimants do not have any related tax consequences from the fraudulent debt and are not wrongly intercepted due to these fraudulent activities working with both DOR and IRS. MDUA limits access to UI accounts where evidence of prior unauthorized access (hacking) is shown and provides guidance to these affected claimants of how to not be more “aware” of phishing and other cyber-attacks to steal their PII.

MDUA has provided online messaging and notice to claimants regarding any potential acts by fraudsters and bad actors.

- Include details regarding how the state provides a reporting mechanism for UI ID fraud on their websites, communicates status updates for such investigations, and takes action to protect the victim when the state determines that UI ID fraud has occurred (*see UIPL No. 11-23* (dol.gov/agencies/eta/advisories/uipl-11-23) for more details on protecting victims of ID fraud).
- Include the state’s procedures for mitigating negative impacts on the UI ID fraud victim (e.g., establishing a pseudo claim record, temporarily marking the overpayment as “uncollectible”, etc.).
- **(Topic #8) – If the state has not provided complete and accurate overpayment reporting on the ETA 227 reports (Overpayment Detection and Recovery Activities), and the ETA 902P report (Pandemic Unemployment Assistance Activities), the state must provide information on plans for improvement, including timeframes and milestones, for addressing the issue and ensuring complete, accurate, and timely reporting in FY 2024.**

MDUA has submitted ETA 227 and ETA 902 reports.

- If the state has submitted all data for the ETA 227 or 902P reports, this section is not applicable, and the state can input “N/A”.

Attachment H5 Organizational Chart

DEPARTMENT OF UNEMPLOYMENT ASSISTANCE SEPTEMBER 2023

