

Boston Workforce Development Initiative

Request for Proposals: Public Policy Advocacy

**The Boston Funders Group
c/o The Boston Foundation
75 Arlington Street
10th Floor
Boston, MA 02116**

Issued May 20, 2003

Due Date for Proposals: July 22, 2003 at 5:00 p.m. to:

**The Boston Foundation
Attention: Corey Davis, Grants Manager
75 Arlington Street, 10th floor
Boston, MA 02116**

The Funders Group comprises:

The Boston Foundation, the Boston Neighborhood Jobs Trust/The Mayor's Office of Jobs and Community Services, the Commonwealth of Massachusetts/Department of Labor and Workforce Development, the Annie E. Casey Foundation, the Paul and Phyllis Fireman Charitable Foundation, Fleet Charitable Trusts, the Hyams Foundation, the Rockefeller Foundation, State Street Foundation, and the United Way of Massachusetts Bay

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SECTION I: PROPOSAL TIMELINE

DATE	EVENT	COMMENTS
Tuesday, May 20	RFP Available to Bidders on The Boston Foundation's web site* www.tbf.org	
Thursday, June 5 10:30 – 12:30	Bidders' Conference Fleet Bank Long Lane Room, 2 nd Floor 100 Federal Street Boston, MA 02110 (Attendees must RSVP to Megan Briggs, mkb@tbf.org, by June 2 nd)	Not mandatory for interested bidders to attend; for informational purposes only
Wednesday, June 12	Letter of Intent due to: The Boston Foundation Attn: Corey Davis, Grants Manager 75 Arlington Street, 10 th floor Boston, MA 02116	Not mandatory but interested bidders are strongly encouraged to submit
Tuesday, July 22	PROPOSALS DUE BY 5:00 PM TO: THE BOSTON FOUNDATION Attn: Corey Davis, Grants Manager 75 Arlington Street, 10 th floor Boston, MA 02116 <i>(Please Note: incomplete or late proposals will not be accepted)</i>	Please submit eight copies and one original
Tuesday, September 16	Notification to Awardees will be made by mail	

*Please **e-mail** all questions and requests for clarification regarding the RFP to Geri Scott at Jobs for the Future at: gscott@jff.org.

Frequently Asked Questions and responses will be posted on the Boston Foundation web site periodically throughout the proposal development process.

It is the Bidders' responsibility to check the web site for updates and postings. Initiative Staff are available for technical assistance and consultation throughout the proposal development process.

Please also email technical assistance requests to gscott@jff.org.

SECTION II: INITIATIVE BACKGROUND

The Boston Workforce Development Initiative is an innovative response by local and national foundations, the City of Boston and the Commonwealth of Massachusetts to an increasingly wide skill gap that has left too many job seekers and workers in poverty while employers are unable to meet their needs for a skilled workforce. In a time of increasing need, the workforce development system is inadequately funded and has fewer resources devoted to training. Job and skill seekers, and employers alike, are confronted by programs and services that offer too few pathways to the right mix of education, training and other services needed to close the skill gap.

This Initiative capitalizes on the best practices and unique strengths of the City and the Commonwealth's workforce development system to help low-income adults gain the skills they need to advance into family supporting employment. The Initiative will bring major new investment from a coalition of Boston and national foundations, along with investments by the City of Boston and the Commonwealth of Massachusetts, to help build new and expanded partnerships between Boston's employers and workforce development providers.

Over the next five years, the Boston Workforce Development Initiative will focus on three key systems change strategies:

- Public Policy Advocacy;
- Workforce Partnerships; and,
- Strengthening Capacity

Public Policy Advocacy: The Public Policy Advocacy component is designed to achieve long term, sustainable improvements in the workforce development system's ability to help low-skill/low-income individuals achieve family supporting incomes. The Initiative will work closely with city and state officials to institutionalize successful innovations emerging through the activities of the Workforce Partnership and Strengthening Capacity components. It will also link its efforts to those of organizations working for change at the federal level.

Workforce Partnerships: The Boston Workforce Development Initiative will make substantial multi-year investments in industry sector and/or occupational partnerships that offer multiple points of entry to basic education and vocational skills training leading to career oriented first jobs and promotional/advancement opportunities. Funding will support approaches that build long lasting relationships among employers, workers, education, training and support service providers to help low-income individuals make progress toward economic self-

sufficiency. A separate RFP was issued on May 20, 2003 to fund these partnerships.

Strengthening Capacity: The Strengthening Capacity component seeks to strengthen alliances, build the infrastructure, and enhance the knowledge base of staff among community based organizations, community colleges, and other members of the workforce development service delivery network in order to effectively meet the workforce needs of businesses and low-income job and skill seekers. The Initiative is currently providing financial support, management assistance and learning opportunities to six community-based organizations to enhance organizational infrastructure and systems to support workforce development program strategies and services. This component of the Initiative is currently underway and the Asian American Civic Association, Jamaica Plain Neighborhood Development Corporation, La Alianza Hispana (in collaboration with Oficina Hispana), Project Place and Vietnamese American Civic Association have been chosen to participate. Applications are not being accepted for this program at this time. For more information, please contact Beverly Wing of Management Consulting Services at (617) 556-0099.

The Funders will periodically convene the grantees across the three systems-change strategies. The Funders will expect grantees to participate in these activities in order to leverage impact and learning across the three strategy areas.

Financing

Eight Boston and national foundations, together with the City of Boston and the Commonwealth of Massachusetts, are members of the Funders Group. The members of the Funders Group include: the Boston Foundation, the Annie E. Casey Foundation, the Commonwealth of Massachusetts, the Paul and Phyllis Fireman Charitable Foundation, Fleet Charitable Trusts, the Hyams Foundation, the Mayor's Office of Jobs and Community Services, the Rockefeller Foundation, the State Street Foundation, and the United Way of Massachusetts Bay.

Evaluation

The Initiative has the potential to serve as a model for states and workforce development systems across the country. A comprehensive formative and summative evaluation of the process and outcomes will help the Funders and grantees learn about successful strategies and identify areas for improvement during program implementation. It will also test the Initiative's assumptions about the three-pronged strategy. The evaluation will document successful practices, barriers that impede systems reforms, and the overall impact of this significant investment in building economic opportunity in metropolitan Boston. Grantees

will be expected to document their activities and accomplishments to contribute to the evaluation process.

Initiative Management

The Funders Group has contracted with several different organizations to help implement the Public Policy Advocacy, Workforce Partnerships and Strengthening Capacity components of the Initiative, under the leadership of the Funders Group. The Funders have selected Jobs For the Future to oversee the implementation of the Initiative, provide development assistance, coordinate the work of the other consultants, and support the Funders' planning efforts to sustain the Initiative. Jobs For the Future is also managing the Public Policy Advocacy component of the Initiative. The Boston Private Industry Council (PIC) is managing the Workforce Partnerships component, providing technical assistance to industry or occupational sector partnerships that are preparing to submit grant applications and coordinating the selection process. After the Funders have made grant awards, the PIC will convene grantees to review progress, share strategies and identify technical assistance needs. Management Consulting Services is managing the Strengthening Capacity work with four community-based organizations and a partnership of two community-based organizations, building their capacity to provide effective services to their low-income constituents. Commonwealth Corporation is contributing to the technical assistance and capacity building resources of the Initiative, as well as the design of the Initiative's evaluation strategy.

SECTION III

PUBLIC POLICY ADVOCACY

Goals, Principles and Priorities

The Boston Workforce Development Initiative seeks an organization or collaboration of organizations to develop and implement a public policy advocacy campaign designed to improve the workforce development system in Massachusetts so that it provides a more effective means for low-income individuals to enter and succeed in the workforce.

The goals of the Public Policy Advocacy Campaign include:

- 1) to reform the workforce development system so it more effectively assists low-income individuals to enter the workforce and advance to family supporting jobs; and,
- 2) to reform, support and promote the models developed through the Partnership and Strengthening Capacity components of the Initiative.

Like the Workforce Partnerships and Strengthening Capacity components of the Initiative, the Public Policy Advocacy component is intended to support a set of principles for system reform. These **core principles of the Boston Workforce Development Initiative** describe the Initiative's vision for reform of the workforce development system. The workforce development system should:

- focus on leading low-income, low-skilled job-seekers to jobs that are family-sustaining;
- be dual-customer, focused on the needs of employers as well as job-seekers;
- provide greater access to education and training as individuals move along a career ladder to higher paying jobs.

To guide the work of the public policy advocacy campaign, the Funders Group has developed a set of priorities that represent the kind of system reform expected from this component of the Initiative. This component will focus on reforming the statewide policies that fund and guide workforce development programs in order to make them more supportive of the Initiative's core principles. Bidders should note that systems reform is also a goal of the Workforce Partnerships and Strengthening Capacity components, which are expected to affect system reform at an operational level. The Public Policy Advocacy component is charged with translating the operational successes of

these Initiative components into broad policy and integrating them into its priorities.

The public policy priorities presented in this document were developed through a series of consultations with local leaders in workforce development, representing the provider, union, government and employer communities.

Through this RFP, the Initiative seeks an organization(s) to develop and implement specific short- and long-term strategies to move the system in the direction outlined by the public policy priorities. During the course of the campaign, these priorities may shift as the environment changes. The organization(s) will be expected to work closely with the Funders Group as priorities are refined and as specific campaign strategies are developed.

An essential first step in this effort is to build public support for investment in workforce development. The publicly funded workforce development system is not widely understood or valued for the role it can play in bringing greater economic stability to individuals, families, employers and communities. The Funders place a high priority on organizations that can build public support for a workforce development system that helps individuals develop skills that will help them access family-sustaining jobs, and also helps businesses meet their labor market needs.

The Public Policy Priorities of the Workforce Development Initiative include:

1. Build a broad continuum of services. Massachusetts needs to invest in a broad continuum of services that lead low-income residents from basic education through entry-level to family sustaining jobs. **This system should:**

- be highly accessible to working people, with flexible scheduling and services that are responsive to changing conditions (e.g. work-based, e-learning, off-hours.)
- offer a broad array of diverse programs to meet diverse needs, including pre-employment ESOL, Adult Basic Education, and skills training;
- encourage training for advancement;
- lead to jobs paying family-supporting wages;
- assist individuals, including incumbent workers, dislocated workers, the unemployed and the underemployed, to develop and pursue a career plan;

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- assist individuals to access public resources (such as child care, health care and food stamps) that contribute to family economic sufficiency, and ensure availability of these resources;

2. Create industry-responsive career ladder programs aimed at the advancement of low-wage workers. To ensure greater opportunities for advancement, **the system should:**

- fund entities that can identify employer and community needs, build employer relationships and match employers to providers of education and training;
- strategically target resources on growth sectors or occupations that offer good jobs and career ladders;
- mobilize resources from the private as well as public sectors;
- raise visibility and support for workforce development as contributing to the economic well being of employers, individuals and communities.

3. Coordinate the funds and policies of all agencies involved in workforce development. Funds for education, training and support services can be put to more effective use with reforms that coordinate the programs currently operated by several different state agencies. **Such reforms should:**

- streamline access to funding for service providers, employers, and participants;
- reduce bureaucratic barriers that currently limit access to education, training and support services, transitional benefits and income supports for job and skill seekers as well as for employers;
- support long-term goals for individuals, including advancement to family-sustaining jobs;
- create shared goals across agencies, and coordinated policies driven by those goals;
- be promoted by stronger state and local Workforce Investment Boards to be the vehicle for change and coordination.

SECTION IV

CRITERIA FOR APPLICANTS

The Funders Group will dedicate up to \$250,000 per year for up to five years to public policy advocacy in support of the goals of the overall Initiative. The Public Policy Advocacy component will be a multi-faceted effort, and the organization that leads it will need capacity and experience in several key areas, particularly grassroots organizing, but also including coalition building, public relations, public policy analysis and development, legislative advocacy, and research. The Funders of the Initiative recognize that few, if any, single organizations have the necessary expertise in all these areas. For this reason, the Funders encourage proposals that draw on the resources of a number of organizations. Proposals may be submitted by a single organization, by a lead organization planning to subcontract for particular expertise, or by a collaborative. Bidders must clearly state how they will organize their internal systems of communication and responsibilities, to ensure accountability from all partners and a coherent, effective approach.

Bidders should have the ability to accomplish the following activities:

1. Engage diverse stakeholders across the state, including participants, providers, employers, unions, workforce investment boards, and others in an organizing and advocacy campaign;
2. Develop research and analysis of existing programs and policies to provide supporting documentation for the public policy agenda;
3. Develop a marketing plan to create higher visibility for the system, its stakeholders, and their successes and potential;
4. Work effectively with the legislature and administration officials;
5. Build public support for public investment in workforce development;
6. Work in close collaboration with the other components of the Initiative – Strengthening Capacity and Workforce Partnerships – to institutionalize successful innovations emerging from those components. Key goals of the Public Policy Advocacy component are to reduce the barriers to effective implementation of the other components, and to develop systems to institutionalize their successes throughout the publicly-funded system.

In addition, the organization(s) must have knowledge of the current workforce development system, including sources of funding, state and federal regulations, the operational issues of providers, and the access issues of consumers.

Section V

Application Guidelines

A. General Guidelines for Applicants:

- The organization(s) funded through the Public Policy Advocacy component will be expected to work closely with the Funders Group and with the other components of the Initiative, including attendance at regular meetings.
- If more than one bidder is selected for funding, each will be expected to coordinate efforts and participate in regular meetings to ensure a synchronized, coherent approach.
- All grantees will be expected to participate in an external evaluation. The success of the evaluation will depend upon grantees providing accurate and complete data to evaluators in a timely manner.

Applications will consist of four sections:

- A Program Narrative that describes how the organization(s) will carry out the intent of the Public Policy Advocacy component. Proposals should be no longer than 20 pages, 1 1/2 spaced. The narrative should respond to the questions beginning on page 10.
- If applicable, memoranda of understanding and letters of commitment that describe the role and commitment of each member of the collaborative or subcontractor.
- A Financial Plan that details requested funds. (See page 14 for required components).
- Standard attachments (see page 14).

Applicants must submit one original and eight copies of their proposal by 5:00 p.m. on Tuesday, July 22, 2003 to:

**The Boston Foundation
Attn: Corey Davis, Grants Manager
75 Arlington Street, 10th Floor
Boston, MA 02116**

Applicants should submit a letter of intent by June 12, 2003 by U.S. mail to:

The Boston Foundation
Attn: Corey Davis, Grants Manager
75 Arlington Street, 10th floor
Boston, MA 02116

A bidders' conference will be held at Fleet Bank, 100 Federal Street, Long Lane Room, 2nd Floor, Boston, MA 02110 on Tuesday, June 5 from 10:30 to 12:30 p.m. Anyone who does not RSVP to Megan Briggs, mkb@tbf.org, by June 2nd will not be admitted to the bidders' conference given security requirements. Questions and answers discussed at the bidders' conference will be posted on the Boston Foundation's web site (www.tbf.org).

B. Application Guidelines

Part 1: Program Narrative

Part 1 of the application contains the technical proposal that describes the applicant's plan and capabilities to carry out the Public Policy Advocacy component. The program narrative should respond to the questions below in light of the principles and public policy priorities laid out in Section III of this RFP.

1. Cover Sheet from Attachment B with following information:

- a. The name of the lead agency applying for the grant and contact information for the contact person;
- b. The names of all partners in your project, their contact information and organizational affiliations, and their role in the current project.
- c. The signature of the appropriate legal authority at your institution or agency.

2. Executive Summary. Include a one paragraph Executive Summary describing the organization(s), the primary strategies you will pursue and the key outcomes of the first three years.

3. Discuss how you will approach the Initiative's public policy priorities listed in Section III of the RFP.

What do you perceive as the major impediments in the current workforce system to achieving these priorities? Include regulatory, legislative, political, economic and capacity issues in your response.

What regulatory, legislative, political, economic or capacity conditions do you think present opportunities on which to build to achieve these priorities?

What approach would you take to building a campaign to respond to these impediments and opportunities in order to achieve the public policy priorities of the Initiative?

Which priorities do you think would have the greatest impact on the system, and which would you pursue first?

Discuss some specific strategies for policy change (legislation, regulatory change, etc.) you might pursue in order to reach the goals articulated by the Initiative's priorities, and why. We are not looking for a final campaign plan, but want to learn about your approach and understanding of the issues.

- 4. Describe how your organization(s) will develop the strategies and campaign tactics you describe in response to question 3.** Include discussion of how you would involve stakeholders (including participants, providers, employers and others) in the process and how decisions would be made.
- 5. Outline how your organization(s) would organize a campaign to promote the public policy priorities.** Include discussion of your approach and capacity to:
 - a. build statewide support among a broad constituency with interest in workforce development, including participants, providers, employers and others;
 - b. advocate at the State House;
 - c. advocate with administration officials;
 - d. develop relationships with federal efforts when issues cannot be addressed at the local or state level.
- 6. Describe how your organization(s) would build public support for investment in workforce development. How will you develop a marketing plan?** What methods of visibility and public relations would you use? Describe any additional partnerships you would develop specifically for public relations, if any.

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7. **Describe how your organization(s) would develop and use research to support the campaign.** What information would be useful that is not currently available, and how would you collect it? How would you use already existing data to support the public policy agenda? Describe any additional partnerships you would develop specifically for the purposes of research, if any.
 8. **Describe how your organization(s) would effectively advocate at the State House.** Strong relationships with legislators will be crucial to passage of any legislation. Describe any additional partnerships you would develop specifically for the purposes of lobbying, if any.
 9. **Describe your qualifications to undertake this project.** Include the organizational structure of the bidder(s), including management structure and roles of staff, and the additional partners that will be working with you. What similar work have you done in the past? Describe the scope of that work, its goals, the activities you undertook and the outcomes of the project or campaign. For each additional partner or subcontractor, include background information to demonstrate their qualifications.
 10. **Describe how you would ensure close collaboration with the other components of the Initiative (Workforce Partnerships and Strengthening Capacity) and with the Initiative's funders.**
 11. **Include a three-year work plan and timeline of first-year activities.**
 12. **For proposals with partnering organizations, describe the internal systems for communication, division of responsibilities and accountability.**
 13. **Discuss relevant experience with or knowledge of workforce development issues.** If you have limited experience in the field of workforce development, describe related expertise, and how you will ensure that the public policy advocacy campaign is grounded in knowledge of workforce development.
 14. **Please add any additional information to highlight your ability to carry out a public policy advocacy campaign focused on workforce development.**
 15. **Describe how your organization(s) will measure the success of the public policy component.** Include process measures, and short- and long-term outcomes. The Workforce Development Initiative will have an external evaluator to evaluate all components of the campaign. Describe how you

would work with them, and include previous experience working with an evaluator.

Part II: Collaborative Agreement

Attach signed memoranda of agreement or subcontracts outlining the roles, responsibilities and commitments of each member of the collaborative. Clearly identify which organization will be the lead agency and fiscal agent for the partnership, if relevant.

Part III: Financial Plan

Attach a financial plan that includes the following:

1. All costs associated with the project. Include a detailed first year budget and summary budgets for years 2 and 3. The contract will be awarded for up to three years, with an option to renew for up to two additional years. Break out costs in categories that include staff, fringe, supplies, space, materials, public relations and marketing, indirect costs, and any subcontracts.
2. A budget narrative that includes the following:
 - a. Explanation of all costs.
 - b. Roles and responsibilities of all itemized staff positions.
 - c. An estimate of the time and resources allocated to each of the following activities:
 - i. statewide organizing;
 - ii. research;
 - iii. marketing, PR and visibility;
 - iv. advocacy;
 - v. project management.

Part IV: Attachments

Please include the following:

- 501(c)(3) IRS Letter of Determination (if applicable)

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- Lead organization's current operating budget
 - Audited financial statements for most recent year
 - Lead organization's Board of Directors
 - Resumes of program director and key staff members

**APPENDIX A: LETTER OF INTENT TO BID
REQUEST FOR PROPOSALS**

**This is to notify the Boston Funders Group that the following organization
intends to submit a proposal for a Public Policy Advocacy grant.**

Lead Organization: _____
Address: _____

Contact Person/Title: _____
Telephone: _____
Fax: _____
E-mail Address: _____

Partner Organizations: (Add additional lines if necessary)

Name _____
Address: _____

Contact Person/Title: _____
Telephone: _____
Fax: _____
E-mail Address: _____

Signature/Title: Lead Organization

Date

Please mail to:

**The Boston Foundation
Attn: Corey Davis, Grants Manager
75 Arlington Street, 10th floor
Boston, MA 02116**

APPENDIX B: PROPOSAL COVER SHEET

Lead Organization: _____
Contact Person/Title: _____
Telephone & E-mail: _____
Role in Project: _____

Partner Organization (add additional partners on separate sheet if necessary)

Name: _____
Contact Person/Title: _____
Telephone & E-mail: _____
Role in Project: _____

Partner Organization:

Name: _____
Contact Person/Title: _____
Telephone & E-mail: _____
Role in Project: _____

Partner Organization

Name: _____
Contact Person/Title: _____
Telephone & E-mail: _____
Role in Project: _____

Partner Organization:

Name: _____
Contact Person/Title: _____
Telephone & E-mail: _____
Role in Project: _____

Signature/Title: Lead Organization

Date