



**Umbrella Memorandum of  
Understanding (MOU)**

**Workforce Innovation and  
Opportunity Act (WIOA)  
South Shore Workforce  
Development Board and  
WIOA Partners**

**Updated: July 19, 2018**



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**Workforce Innovation and Opportunity Act (WIOA)  
South Shore Workforce Development Board and WIOA Partners  
Umbrella Memorandum of Understanding (MOU)**

**I. PURPOSE, GOALS, MISSION and REGION**

This Memorandum of Understanding (MOU) communicates an updated agreement developed and executed between the South Shore Workforce Development Board (SSWDB), with agreement of Mayor Thomas P. Koch (CEO) and the WIOA Required and Non-required Partners (Partners), relating to the operation of the One-Stop delivery of service within the south shore workforce Service Delivery Area (SDA). As the convener of MOU negotiations, the SSWDB worked together with area Partners to update the June 26, 2017 Agreement designed to shape how the local One-Stop Career Center (South Shore Career Centers) services are delivered in the region.

This MOU defines the roles and responsibilities of the Required and Non-required Partners to operationalize the delivery of services necessary to produce the best possible outcomes and a coordinated vision for shared customers – youth, job seekers and businesses. In addition, the MOU includes additional provisions agreed to by all parties that are consistent with all Partner programs, services and activities authorizing statutes and regulations.

**The following documents were recently approved by the MOU Partners and are included in this Updated MOU within Appendix E:**

- Attachment A: Shared Customer Referral Form (from SSCC to Partners)
- Attachment B: Shared Customer Referral Form (from Partners to SSCC)
- Attachment C: Definition of a Shared Customer for the Region
- Attachment D: “*Pathway to Success*” Customer Flow Infographic

These documents were designed to better serve the shared customers and to track their progress in obtaining the proper services. The goal is to ensure that all target and priority populations have access to the required services outlined in the continuum of service customer flow map and to provide “contact points” to maintain a connection with the shared customer. This process will ensure the services are delivered effectively and efficiently.

The SSWDB is the Local Workforce Development Board with local oversight responsibility and policy-making authority for federal and state workforce development activities in the South Shore region. The organization creates connections with local businesses, educational institutions and community partners to ensure the alignment of strategic, market-driven workforce goals and initiatives that support the 22 cities and towns within the region.

The SSWDB competitively procures the operator of the One-Stop System in the South Shore, identified as the South Shore Career Centers (SSCC). The SSCC administers the

One-Stop career delivery system in the region as outlined by the American Job Centers (AJC) federal requirements. The SSCC fosters partnerships to provide businesses and job seekers the services required to achieve the key provisions of WIOA and the Commonwealth of Massachusetts Workforce Development Plan.

The SSWDB, SSCC and Partners work collectively to establish and monitor a workforce development system that maintains high-quality and easily-accessible access points throughout the South Shore region. The MOU identifies “Shared Customers”, as individuals with disabilities, education, language and income barriers, and those with Veteran status who will achieve measureable outcomes in the areas of education, training, job placements/retention and career pathways towards self-sufficiency.

**Shared Goals among the SSWDB, SSCC and Partners remain the following:**

- The South Shore Workforce Development System will be business-driven to meet the needs of area businesses.
- All eligible shared customers will have equal access to literacy development, career advising, workforce training and education, job placement services and vocational counseling and receive support from all partners in navigating these options.
- Utilization of a shared customer tracking system to gather data and measure outcomes.
- Responsible for performance measurements and data reporting.
- Establish a comprehensive and effective LMI data collection and reporting system to ensure programs, services and resources are addressing the needs of the region.
- Contribute appropriate services, and maintain open communication and collaboration in the delivery of services to shared customers.
- Share information about specialized programs/services and contribute to a ***Master Resource Guide*** that will be utilized as a resource tool by each agency to effectively provide services to shared customers.
- Cross-training will be provided on an as needed basis to ensure all staff and management remain familiar with the specialized programs, services and resources of each respective organization and provide culturally competent services that meet the needs of our diverse customer base.

**Mission**

The SSWDB will work in partnership with the SSCC and all Partners to ensure businesses, job seekers and youth can efficiently access and utilize career development services and resources across the region through comprehensive, affiliate facilities, enhanced communication and collaboration among all entities.

**SSWDB Goals are to:**

- Align investments in workforce, education and economic development to respond to regional job growth.
- Achieve positive results for businesses and job seekers including individuals with barriers to employment.
- Provide job seekers and existing workers with high-quality career training and supportive services needed to obtain and maintain a quality job/career path.
- Help businesses find skilled employees and access education and training to meet their current workforce needs.
- Strengthen career pathways, work-based learning, apprenticeship programs, sector strategies and business engagement.
- Maintain a workforce system that values all Partners, and supports consistent collaboration and communication to sustain a high-quality delivery of services for businesses, job seekers and youth throughout the South Shore region.

**Region**

The SSWDB is the Local Workforce Development Board with oversight responsibility



and policy-making authority for federal and state workforce development activities in the South Shore region. The region consists of the following 22 cities and towns: Braintree, Carver, Cohasset, Duxbury, Halifax, Hanover, Hingham, Holbrook, Hull, Kingston, Marshfield, Middleborough, Milton, Norwell, Pembroke, Plymouth, Plympton, Quincy, Randolph, Rockland, Scituate and Weymouth.

The Region is home to a variety of industry clusters with a higher concentration in education, healthcare, financial services, professional, entertainment/food services, and retail as noted in the LMI data provided in Appendix B.

It is important to note that a comprehensive LMI data collection process will be undertaken in July and August of 2018, and will be incorporated into this Updated MOU Agreement as appropriate.

**Greater Boston Market Area**

The northern communities within the SSWDB SDA are also impacted by the Greater Boston Market Area as a result of accessible public transportation connections including commuter boat, train, commuter rail and bus services. The Greater Boston Market Area provides numerous employment opportunities for residents of the South Shore SDA,

benefiting not only area job-seekers but businesses within the Greater Boston region as well. The SSWDB, SSCC and Partners must remain cognizant of the economic resources and opportunities in Greater Boston, and foster opportunities to work collaboratively with businesses and workforce entities in both regions for the benefit of all in need of workforce development services and resources.

**II. ONE-STOP CAREER CENTER (OSCC) PARTNERS**

In accordance with WIOA Section 121(c), this Local Memorandum of Understanding has been developed and executed in agreement with the Chief Elected Official of the South Shore Workforce Development Area, the SSWDB, and WIOA OSCC Required Partners as defined in WIOA Regulations 20 CFR Part 678.400 as mandatory Partners in the SSCC.

In addition to the WIOA Required Partners, the SSWDB and SSCC will work collaboratively with numerous high-quality community partners throughout the region. Although these agencies are not designated as “Required Partners” by WIOA, they are none-the-less just as critical, and are valued members of the implementation of a holistic workforce development eco-system across the region.

**Below is a listing of our “Required” and “Non-required” Partners, which will be referred to as an aggregate throughout the remainder of this MOU Agreement as “Partners”.**

<b>WIOA Mandated Programs</b>	<b>WIOA Required Partners</b>
WIOA Title 1 Adult WIOA Title 1 Dislocated Worker WIOA Title 1 Youth	South Shore Career Centers Department of Career Services
WIOA Title III Wagner-Peyser Veterans’ WIOA Program Unemployment Insurance Compensation Trade Adjustment Assistance Act	South Shore Career Centers Department of Unemployment Assistance Department of Career Services
WIOA Title II Adult Education and Literacy	Plymouth Public Library Rockland Public Schools Randolph Community Partnership, Inc. Quincy Community Action Programs, Inc. Training Resources of America, Inc.
Title IV Vocational Rehabilitation	Massachusetts Rehabilitation Commission Massachusetts Commission for the Blind
Title V Older Americans Act	Coastline Elderly Services, Inc. Operation A.B.L.E. of Greater Boston, Inc. Greater Boston Chinese Golden Age Center
Community Service Block Grant	Quincy Community Action Programs, Inc.
Temporary Assistance for Needy Families	Department of Transitional Assistance
Migrant Seasonal Farm Workers (Section 167)	South Shore Career Centers
Youth Build	Training Resources of America, Inc. Job Corps

**Non-Required Partners:**

Boston Chinatown Neighborhood Center – Quincy Office  
Father Bill’s & MainSpring, Inc.  
Norfolk County Correctional Facility  
Massasoit Community College  
Plymouth Boys and Girls Club  
Quincy Asian Resources, Inc.  
Quincy Housing Authority  
Quincy College  
Quincy Public Schools  
South Shore Community Action Council, Inc.  
South Shore Collaborative on Employment  
South Shore Vocational Technical High School  
Wellspring Multi-Service Center

**III. DURATION, MODIFICATIONS AND TERMINATION OF THE MOU**

**Duration:**

WIOA Section 121(c)(g) requires that the MOU shall be reviewed not less than once every three-year period to ensure appropriate funding and delivery of services, including effectiveness, physical and programmatic accessibility. WIOA Regulations Subpart C 20 CFR Part 678.500 further requires MOU renewal following the three-year review if substantial changes have occurred. This agreement shall commence on July 19, 2018 and shall terminate on June 30, 2020, unless otherwise terminated by agreement of all parties or superseded.

**Modification:**

This Updated MOU constitutes the entire agreement between the parties and no oral understanding not incorporated herein shall be binding on any of the parties involved. This MOU can be modified, altered or revised as necessary, by mutual consent of the parties through the issuance of a written amendment signed and dated by all parties.

**Termination:**

In the event that a party wishes to cease being part of this MOU, said entity shall notify the SSWDB in writing 30 days in advance of the intention to terminate their involvement.

**IV. ASSURANCES**

The SSWDB, SSCC and Partners agree to conduct the following activities at a local level:

1. Enter into a local MOU with the SSWDB relating to operation of the One-Stop delivery system as applicable.
2. Participate in the operation of the One-Stop delivery system consistent with the terms of this MOU, the requirements of WIOA, the requirements of Federal laws authorizing the programs and activities.

3. Define “shared” customers between Partners to create a clear understanding of how multiple providers, services and resources should support youth, job seekers and businesses.
4. Redesign the SSCC customer flow and service practices across partner agencies, including ensuring the accessibility and availability of services to “shared” customers.
5. Utilize robust technology tools to scale-up practices, provide more significant supports for individuals with barriers to employment, including basic skills assessment, remediation and career development tools.
6. Track and evaluate the outcomes for individuals who face barriers to employment.
7. Use a portion of the funds available for programs and activities to maintain the One-Stop delivery system, including infrastructure and shared costs of OSCCs, 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)).
8. Partners will provide representation on the Local Board to the extent possible and/or participate in SSWDB ad hoc activities/events or on standing committees.
9. Partners will participate in the competitive selection process for the OSCC lead operator in the local workforce area.
10. The MOU will be reviewed, and, if substantial changes have occurred, renewed, not less than once every three-year period to ensure appropriate funding and delivery of services as required by WIOA Sections 121 (c)(g). The MOU must be updated to reflect any change in the One-Stop Partner infrastructure cost contributions. WIOA Regulations Subpart C 20 CFR Part 678.500 further requires MOU renewal following the three-year review if substantial changes have occurred.
11. Subject to applicable legal constraints, including but not necessarily limited to those contained in G. L. 151A and 20 C.F.R. Pt. 603, the parties of this MOU agree to seek increased sharing of data with a view to improving the quality of service-delivery to both job-seekers and business-customers. The Party whose data is requested to be shared, shall be the judge, in its sole discretion, of the legal constraints governing how and whether its data may be shared. The parties of this MOU understand that a shared data system is being designed at the state level and will fully support the development and implementation of a state-level data system, subject to the foregoing limitations.

In August, 2017 the South Shore Workforce Development Board established a **Customer Flow and Referral Process Committee and a Data Collection and Training Committee**. In May, 2018 the organization established a **Career Pathway Committee**.

Each of these committees held several meetings to discuss and establish a comprehensive approach to the customer flow and referral process; collection and sharing of data (workforce system and region); and establishment of quality career pathways, training programs and apprenticeship opportunities. As noted, the Career Pathway Committee is newly established and will be having their first meeting in July, 2018.

The Customer Flow and Referral Committee has developed a Referral Form for all shared customers, and is currently working on a comprehensive Customer Flow process with the staff at the South Shore Career Centers.

The Data and Training Committee is working on policies and procedures in which to more effectively collect and share data, as well as create the appropriate training and career pathway opportunities for target populations in our region. The Committee surveyed all partners in an effort to better understand the various data collection and reporting platforms utilized to determine if a unified approach can be implemented in the region. The results of the survey identified a variety of platforms in use by partners, and reinforced the belief that the development of better and more accurate data collection to create meaningful outcome measurements needs to be addressed on a state level in support of local initiatives.

The Committee is in the process of analyzing this information and establishing a recommendation on the technology tools and resources required to create a more effective and comprehensive data sharing and overall communication system among all MOU Partners in the region. As the Committee continued to work on the development of local solutions to the various data challenges it sent an opinion letter in March, 2018 to the Department of Career Services, which summarized their findings and requested assistance.

In May, 2018 the SSWDB, SSCC and Partners established a Career Pathway Committee to identify and develop demand-driven career pathways in the local region. The Committee will utilize the Career Pathways Toolkit created by the Department of Labor to guide the design and development of career pathways in our region. The first Industry Sector in which the Committee is focusing on is Manufacturing, which has been identified as a priority industry in a recent report completed by the SSWDB, *Manufacturing on the South Shore of Massachusetts*. The SSWDB also worked in conjunction with area Workforce Development Boards within Southeastern MA to create a Regional Labor Market Blueprint. This Blueprint also identified manufacturing as a priority industry in the region. The Career Pathway Committee will be working with the Manufacturing Advisory Group in the design and development of Career Pathways to meet the needs and demands of local manufacturers.

## V. PROCESS UNDERTAKEN TO DEVELOP MOU

The SSWDB undertook the following approach in the development of this MOU Agreement.

**Phase 1:** The SSWDB scheduled a series of introductory meetings between all Partners and the SSWDB/SSCC Management team in February and March, 2017 to provide an overview of the MOU Requirements and discuss/outline the process in which the MOU agreement was to be established. All meetings were held in the Quincy Career Center (QCC).

**Phase 2:** The SSWDB conducted meetings in April and May, 2017 between the SSCC staff and the staff of the various Partners. Only one Partner at a time met with the staff of the SSCC, providing a more personal and one-on-one opportunity for the staff of both entities to become better accustomed with one another and to discuss the service delivery opportunities moving forward. Meetings were held at both the Quincy Career Center (QCC) and Plymouth Career Center (PCC) so that staff liaisons within each region could have the opportunity to effectively engage with the appropriate entities.

**Phase 3:** The SSWDB conducted meetings in May and June, 2017 between the key management and decision makers of the Partners and the management team of the SSWDB and SSCC to review and discuss the Draft MOU Agreement. The Partners were given a copy of the Draft MOU Agreement prior to each meeting and were invited to provide input and recommend changes throughout each phase of the draft agreement development process.

**Phase 4:** The SSWDB and Partners signed and submitted a Final MOU Agreement to the Department of Career Services on June 26, 2017 as required for a July 1, 2017 start date.

**Phase 5:** In August, 2017 the SSWDB established a **Customer Flow and Referral Process Committee** and a **Data Collection and Training Committee**. In May 2018 the organization established a **Career Pathway Committee**. The work of these Committees led to the incorporation of new and updated elements that are included in this Updated MOU Agreement submitted on July 19, 2018.

## VI: HOLISTIC APPROACH TO SERVICE DELIVERY

The Workforce Innovation and Opportunities Act of 2014 (WIOA) mandates several key objectives to improve upon the work already accomplished through WIA. Specifically, a new, holistic approach to services emphasizes placing a priority on industry sectors that offer sustainable employment at a living wage in industries that are growing, using competency models for building curriculum and content contextualized to a targeted industry sector. Further, it encompasses an understanding of the importance of partnering with multiple agencies to assist in the outcome of long-term, sustainable employment, as well as, identifying programs to support employment and job search activities within the context of existing policies and procedures.

The purpose of this collaboration is to establish joint processes and procedures that will enable the Partners to integrate current service delivery system resulting in a seamless and comprehensive array of Post-secondary education, social services, job training and other workforce development services. In addition, the SSWDB will develop, convene and implement industry or sector partnerships as well as leverage and coordinate new Federal, State and/or private/philanthropic resources to support the local/regional career pathways system and programs.

The SSWDB, SSCC and Partners are committed to aligning workforce development, education and other associated human and community services into a seamless, customer-focused network of providers to enhance local customer access. One of the primary goals is to improve long-term employment outcomes for individuals receiving assistance through a holistic service delivery system that continually strives to address the needs of all individuals, regardless of their barriers and/or constraints. This will be accomplished through open communication channels, an effective referral process, innovative technology delivery systems, using consistent and current data and information on the available services of all Partners and the employment and training needs of area businesses. **Much of the detail associated with this Holistic Approach will be developed through the work of the Committees moving forward.**

*Following are five features that represent the underlying facets of a holistic approach:*

***Cohort Training*** — Educational studies have shown that learning is most effective among students who do so in a group, usually in a classroom setting. The South Shore region will build upon existing training and education models already in place and combine them with workshops and programs that utilize a cohort learning progression.

***Contextualized Learning*** — The focus of Workforce Development is for a job seeker customer to become gainfully employed in a sustainable career with adequate job skills. To create lasting workplace competencies, WIOA stresses the need for all content and curriculum to feature components that include: exercises, tests, reading, assignments and assessments to be drawn from real-life examples of actual workplace context in which the learning will be applied. This approach will apply to both workshops and cohort training.

***Contextualized Trainings*** — Designing customized training by providing intensive class scheduling, incorporating pedagogic strategies and best practices designed for students who need Adult Basic Education (ABE) skills or English language education and/or occupational postsecondary instructions. Create multiple entry points that accommodate participants entering at differing skill levels (including adults and out-of-school youth with very low basic skills). In addition, create multiple exit points at successively higher levels of education and employment that are aligned with marketable, stackable and “credible” credentials.

***Industry Sectors*** — Another important feature of WIOA is its emphasis on driving workforce development efforts in specific (and desirable) industry sectors that show competitive wages, industry-recognized certifications, college credit programs that lead to degrees, regional and economic growth identified by Department of Labor sources.

**Business Engagement** — One of the most challenging aspects of workforce development has been at the level of involvement and commitment on the part of the business community. The typical workforce training under WIOA would result in a candidate with freshly minted workplace skills and competencies, a resume and perhaps guidelines for a job search, but with few leads.

WIOA stipulates the need for business engagement at three levels:

1. **Advisory Boards:** Where businesses are involved in curriculum development and job mapping based on the human resource needs of that particular business.
2. **Mock Interviews, Site Visits and Guest Lectures:** This involvement goes beyond planning and extends to the classroom itself. Businesses engaged through volunteering staff time to assist with job readiness activities get to see potential candidates before they are finished with training programs, thereby enriching candidates with real-world context.
3. **Internships, Externships and On-The-Job Training (OJT):** Another important aspect of a successful Workforce Development program is the real-life experience that can only be obtained on-the-job. The South Shore region will pursue these opportunities with businesses whenever possible to enhance the experience and marketability of our job seeker customers.

### **Work Plan**

As stated by WIOA, core Partners are to align, connect and integrate services by sharing resources and jointly designing services in ways that improve outcomes for shared customers (youth, job seekers, businesses) and prioritize serving individuals with barriers to employment. In order to maintain and sustain an effective workforce delivery system and process, each Partner agrees to the following:

- Participate in regular meetings as convened by the SSWDB to effectively and continually monitor the process, system and role of each organization.
- Continuous planning to respond to local, state and federal requirements.
- Ensure effective responsiveness to economic conditions and the needs of businesses.
- Participate in data collection and reporting needs.
- Ensure accessibility for all applicable programs and services.
- Effectively refer customers to the broader network of services as necessary to maintain a high level of commitment to customers and businesses.

- Participate in Partner informational sessions as applicable to shared customers, such as in the Career Center Seminars held by the SSCC multiple times each week.

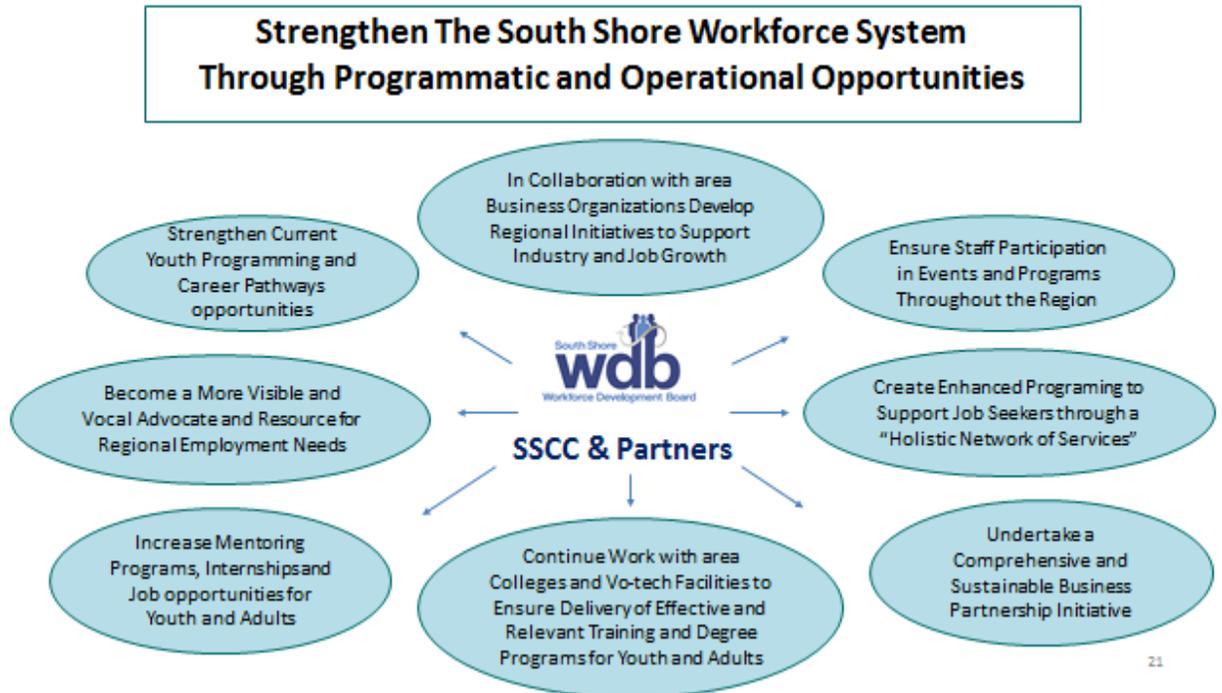
The SSWDB, SSCC and Partners will continue its effort to build a business-driven system in conjunction with providing a holistic approach to meet the needs of job seekers of all ages and abilities. As stated in the initial MOU Agreement dated July 26, 2017, this will be accomplished through the following:

- The development of an integrated system of services.
- Ensure that all facilities, services and equipment are accessible to all.
- Create an effective and sustainable partner referral process.
- Develop clear and comprehensive informational materials that define the resources and services provided by all Partners, which will be available to all shared customers.
- Provide an open process to collect customer information and data that can be effectively shared among all Partners.
- Provide an open process to collect business and economic information and data that can be effectively shared among all Partners.
- Identify areas of expertise or strength among partners to ensure customers can get the most services efficiently.
- Recognize the specific needs of youth in terms of space and technology.

In the second year of this MOU Agreement (Phase 2), the SSWDB, SSCC and Partners will develop the detailed mapping and systems to support an Integrated Delivery of Services as outlined in Sections VII, VIII and IX.

Partners will maintain consistent communication with one another to strengthen and expand upon the work plan and continue to make modifications as agreed by all involved. Diagram 1 provides additional objectives to strengthen the delivery of workforce development services throughout the region.

**Diagram 1**



### **Priority Populations to Serve**

All agree to prioritize services as outlined under WIOA for youth, adult and dislocated workers and for individuals with barriers to employment, including but not limited to:

- Low Income adults including TANF and SNAP recipients
- Youth and adults with disabilities
- Long-term unemployed
- Homeless individuals
- Veterans
- Offenders released from prison and jails
- Older Workers
- Unemployment insurance claimants
- Other groups determined to have barriers to employment
- Eligible migrant and seasonal farm workers

### **Career Pathways**

In the past, the overarching goal of Career Pathway Models was an attempt to integrate adult literacy, ABE, General Equivalency Diploma (GED/HiSET) instruction, English Language Learners (ELL), pre-collegiate developmental education with postsecondary career and technical education (CTE) certificates, associate degree programs, and potentially, a baccalaureate degree. However, today's models focus less on articulation of educational programs and more on a progression to employment. They map occupational

pathways within specific industry groupings to describe the skills needed to advance up occupational ladders and serve as longer-term advancement solutions to employment and skills shortages. Also, they frequently include bridge programs to provide entry points for the lowest-skilled worker.

The South Shore region is continuing the plans to implement the ‘progression to employment’ model whereby a robust referral process between partner agencies will facilitate identification of the nuances inherent in various shared job seeker populations. This will be accomplished through integration and creation of teams comprised of Partner and Career Center staff and will encompass career planning, training (if applicable), professional development, marketing and business services. This will be done in part through Outstationing, the practice of further linking adult education options in the region to the SCC and vice versa through the help of the Outstationed Coordinator assigned by a designated Adult Education Partner. Customers will be grouped and shared as they progress through a continuum of Career Center services to assist them in acquiring gainful employment. Access to wrap-around services will also play a critical role in helping customers with significant barriers to employment achieve their objectives.

The connections between adult education, postsecondary education and workforce will be strengthened. A strong emphasis will be placed on ensuring providers, including Higher Education Institutions providing skills development, including stackable career pathways certificate programs that accelerate achievement of diplomas and credentials that lead to employment and self-sufficiency.

WIOA defines a Career Pathway as a combination of rigorous and high-quality education, training and other services that:

- Aligns with the skill needs of the businesses within the industries with the highest regional demand.
- Positions an individual to be successful for a full range of secondary or postsecondary education options, including registered apprenticeships.
- Includes counseling to support an individual in achieving their educational and career goals.
- Includes, as appropriate, education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupation cluster.
- Organizes education, training and other services to meet the particular needs of an individual in a manner that accelerates the education and career advancement of the individual to the extent practicable.
- Enables an individual to attain a secondary school diploma or its recognized equivalent and at least one recognized postsecondary credential.
- Helps an individual enter or advance within a specific occupation or occupational cluster.
- Ensure support systems are available to help the individual maintain their job with appropriate training and career pathway guidance.

In order to meet these Career Pathway objectives, the SSWDB, SSCC and all Partners agree to work collaboratively to effectively map regional career pathways and ensure accessibility and availability of services to shared customers. It is also important to note that specific services are accessed in a customer-driven manner and that the resources each person will access are based on their particular needs and interests.

In May, 2018 the SSWDB, SSCC and Partners established a Career Pathway Committee to identify and develop demand-driven career pathways in the local region. The Committee will utilize the Career Pathways Toolkit created by the Department of Labor to guide the design and development of career pathways in our region. The first Industry Sector in which the Committee is focusing on is Manufacturing, which has been identified as a priority industry in a recent report completed by the SSWDB, *Manufacturing on the South Shore of Massachusetts*. The SSWDB also worked in conjunction with area Workforce Development Boards within Southeastern MA to create a Regional Labor Market Blueprint. This Blueprint also identified manufacturing as a priority industry in the region. The Career Pathway Committee will be working with the Manufacturing Advisory Group in the design and development of Career Pathways to meet the needs and demands of local manufacturers.

Effective Career Pathway models that require shared program design and delivery must develop a process to include:

- The manner in which services among Partners are to be aligned.
- Development of strategies for referrals and co-enrollments.
- Leverage resources and work collaboratively to expand access to credentials and work-based learning for low-skilled individuals and out-of-school youth.
- Align and identify the support systems for individuals that form different programs to create a clear pathway in support of long-term credential attainment.
- Designing career pathway systems that offer an effective approach to the development of a skilled workforce by increasing the number of workers in the South Shore region who gain industry-recognized and academic credentials necessary to work in jobs that are in-demand.
- Aligning postsecondary educational services with businesses needs, by designing career pathways systems that engage businesses in the development of educational programs up front.
- Develop “early outreach activities” that can increase students’ awareness of college and training programs.
- Enables individual and/or nontraditional clients/students to attain a secondary school diploma or at least one recognized postsecondary credential.

*The Continuum of Services will consist of the following steps:*

- Referral
- Intake/Triage
- Assessment
- Orientation

- Career Planning/Career Development
- Career Readiness and/or Training Services
- Workshops
- Job Search/Job Development
- Job Placement
- Retention Support

An open and consistent communication system will be established among existing business clusters within the region to ensure that the education and training program providers effectively address the skillsets required and that job seekers are properly informed and guided into Career Pathways that will result in a sustainable wage. This information will be obtained through effective Business Services Touchpoints, Surveys, Focus Groups and information gathering sessions.

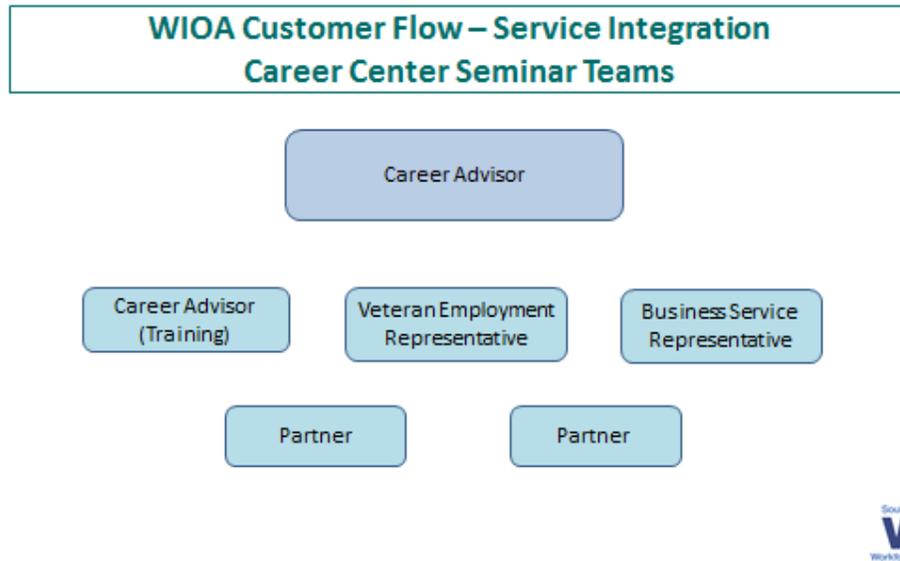
For example the SSWDB has undertaken a strategic planning process to address the workforce and expansion needs of the Manufacturing Sector in the region. In November, 2017 the organization released a *Manufacturing on the South Shore of Massachusetts Report* that identifies the significant growth opportunities for this industry in the region. A series of Action Items were identified, and in March, 2018 the organization established a Manufacturing Advisory Group consisting of business representatives, educational institutions, industry and trade groups and youth and business services staff from the Local One-Stop Career Center. Through the support of a MassDevelopment AMP It Up! Grant the SSWDB is in the process of developing a comprehensive marketing initiative to change the often negative perception associated with a career in Manufacturing to promote the viable and sustainable career pathway opportunities available in the region.

The SSWDB will utilize the model program established through this Manufacturing Advisory Group and develop similar initiatives in support of additional priority industries in our region such as Financial Services, Healthcare, Construction, Professional & Technical Services and Retail.

## **VII: CONTINUUM OF SERVICES FOR PRIORITY POPULATIONS**

The SSWDB, SSCC and Partners are to develop an integrated service delivery system that supports job seekers and businesses through a customer-centered design focus with a clear understanding and vision for the region. The integrated service will identify the manner in which individual Partners provide complimentary services/resources to the individual along a career pathway that could span several years. The SSWDB, SSCC and Partners will evaluate the feasibility of establishing Teams (Diagram 2) among SSCC and Partner Staff that will be designed to provide individualized services to the customer.

**Diagram 2**



Guidance on the development of these systems are provided on a State level by Partnering agencies; however, Partners are to identify opportunities for an integrated and coordinated implementation of services and resources on a local level.

**A detailed mapping and approach for an Integrated Delivery System will continue to be developed in the upcoming year and incorporated as an addendum to this MOU at the appropriate time.**

The SSWDB, SSCC and Partners will work together to ensure that all customers have the foundation knowledge to effectively access and utilize the SSCC network of services. A customer flow map is provided in Appendix C. Shared Customers can be defined as individuals that:

- Are able and willing to work and are interested in an employment opportunity.
- Are prepared to work, with proper transportation and childcare accommodations, if necessary, in place.
- Are ready and willing to take the first step towards employment and/or skills enhancement.
- Are able to take a skills assessment, or willing to undertake training assistance to take the skills assessment.

**Customer flow & referral process:**

All Shared Customers are first introduced to the services and resources of the SSCC through the front Welcome Desk, which is administered by an experienced SSCC staff person.

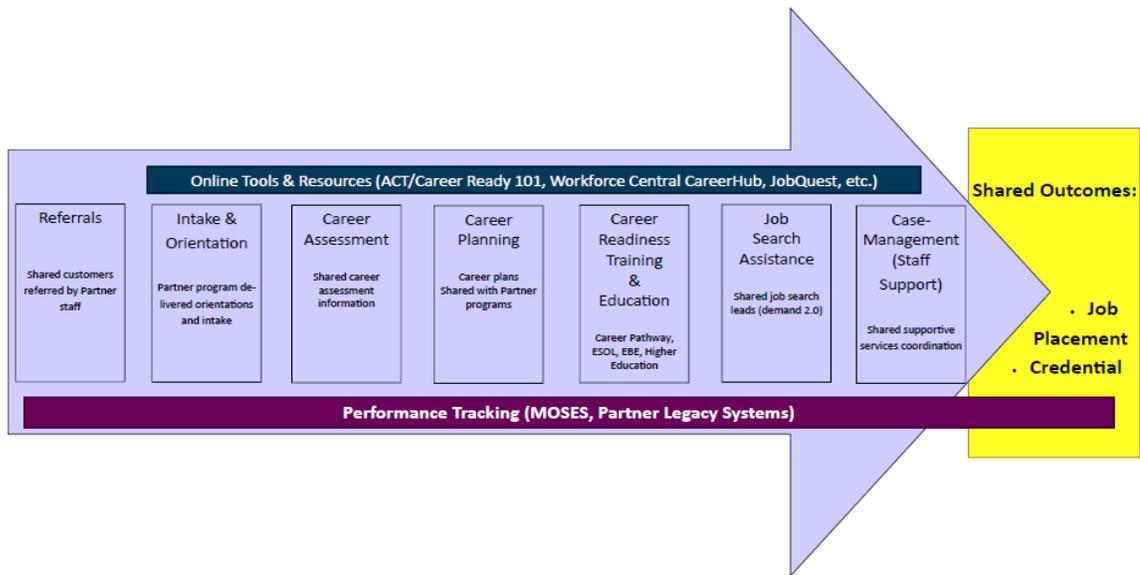
The Customer Flow and Referral Committee has developed Referral Forms for all shared customers and is currently working on a comprehensive Customer Flow process with the staff at the South Shore Career Centers. A “Pathway to Success” Infographic was developed to help convey to all Career Center Customers the primary Career Center Services and the steps involved to access them. The new forms and information developed is included in Appendix E, which have been designed to better serve shared customers and track their progress in obtaining the proper services. The goal is to ensure that all target and priority populations have access to the required services and the continuum of service to provide “contact points” throughout the process to maintain a connection with the shared customer to ensure the services are being delivered effectively.

The process is further outlined below and depicted in Diagram 3.

- All new customers are asked upon arrival at the Membership Desk (or by telephone) if they are Veterans or Migrant Seasonal Farm Workers. Veterans receive priority of services except in the case of UI Online Navigation.
- All new customers flow through the Welcome Desk and log onto Job Quest to gain access to the WIOA Career Center Seminar.
- All customers must be registered in Job Quest to access Career Center services.
- All Partner Agency customers must complete a full Job Quest Registration (co-enrollment) before attending a Career Center Seminar (CCS).
- At the CCS, customers will receive a Registration Card and Pre-Printed Registration Form.
- All receive a CCS “folder”, workshop calendar and information about upcoming Career Center activities (job fairs, etc.).
- All are assigned to a Career Advisor/Specialist (business cards are distributed at the CCS).
- Facilitator uses PowerPoint and covers mandatory information as well as Career Center specific services and resources.
- All registrants complete Individual Action Plan/Career Action Plan by end of seminar and signs-off (staff initials, dates, and gives original to job seeker and keep copy for files).
- Facilitator of CCS becomes (in most cases) the customer’s Employment Counselor.
- Employment Counselor establishes follow-up meeting with customer to determine whether the customer is an Adult/Dislocated Worker.

- Employment Counselor completes an assessment to determine initial referral for Training or Partner services as needed.
- Employment Counselor communicates with Partner Agency Field Engagement Worker and Training Specialists to determine the best path going forward.

**Diagram 3**



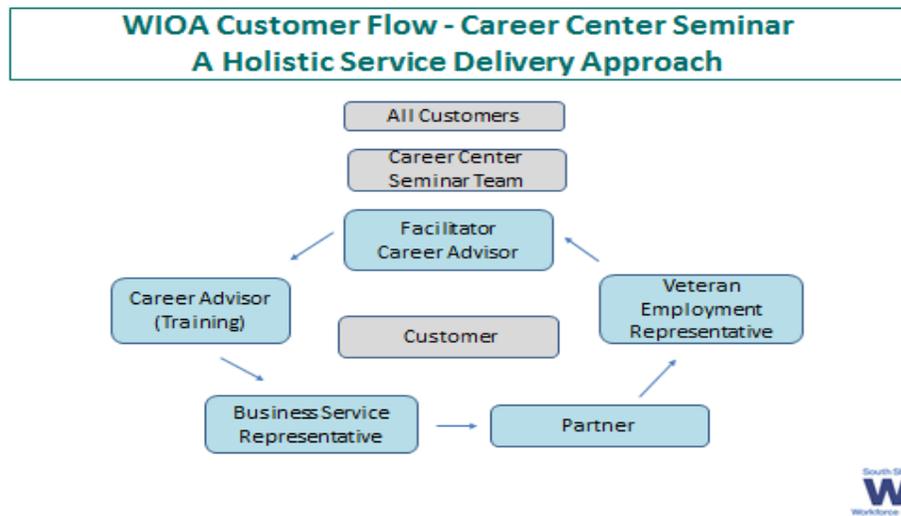
**A list of resources and services available at the SSCC include:**

- Calendar of programs, workshops and events available, including registration in the introductory CCS.
- Comprehensive career counseling based on labor market needs.
- Development of an individualized Career Plan.
- Training Programs through approved vendors that match their skills, interests, personality and employment goals.
- Job search preparation and placement assistance.
- Referrals to Partner organizations and other community resources in regards to resources not available at the SSCC.
- Access to skills, interest and aptitude assessments.
- Resume building and interviewing skills assistance.

- Labor Market Information and identification of the knowledge and skills required to effectively seek current employment opportunities.
- Information on job openings and assistance in navigating the application process.
- Information regarding filing for unemployment claims.
- Access to linguistically and culturally competent services.

Each Customer will be assigned to a Career Center Team that will provide personalized and integrated support to assess and address the needs of the customer (Diagram 4).

**Diagram 4**



**Types of Support Services for each Priority Population:**

The SSCC and Partners provide numerous services and resources to promote the education, training and career advancement of individuals seeking services. A detailed listing of the specialized services provided by each Partner will be outlined in the *Master Resource Guide* that will be created as part of this Updated MOU Agreement. The *Master Resource Guide* will provide information on each Partner and will identify the priority populations that each organization has resources to support.

A customer flow model for each priority population is to be developed that best describes how the priority population will access services through the SSCC and Partner agencies. The roles and responsibilities of each Partner will be described in context of the customer flow.

**A detailed and integrated service delivery system for each priority population among Partners for appropriate services, resources and activities will be developed**

**in the upcoming year and incorporated as an addendum to this Updated MOU as appropriate.**

## **VIII: CONTINUUM OF SERVICES FOR BUSINESSES**

WIOA guidelines and policies are designed to ensure that workforce development programs are aligned with regional economic development strategies that meet the needs of area employers. The SSWDB, SSCC and Partners are committed to the Governor's directive to improve the responsiveness to employer needs and prepare job seekers for high-demand employment opportunities, referred to as "Demand-driven 2.0". The adoption of this employer-focused model enhances the federally defined labor exchange system under WIOA.

The approach for Business customers will be to incorporate an industry-cluster model. New partnerships among Workforce Development Boards, economic development agencies, chambers of commerce and community colleges will foster new information about regional labor markets that can be used by the public sector to redesign skills training and education programs to address the skills-gap that currently exists. Business involvement in industry forums will be important to ensure that their workforce development needs are met.

As noted previously, the SSWDB has undertaken a strategic planning process to address the workforce and expansion needs of the Manufacturing Sector in the region. In November, 2017 the organization released a *Manufacturing on the South Shore of Massachusetts Report* that identifies the significant growth opportunities for this industry in the region. A series of Action Items were identified, and in March, 2018 the organization established a Manufacturing Advisory Group consisting of business representatives, educational institutions, industry and trade groups and youth and business services staff from the Local One-Stop Career Center.

The SSWDB will utilize the model program developed through this Manufacturing Advisory Group and develop similar initiatives in support of other priority industries in our region such as Financial Services, Healthcare, Construction, Professional & Technical Services and Retail.

In addition to receiving the full complement of labor exchange and workforce development services from the OSCC system, business customers will also benefit through the use of a strategic candidate referral system that incorporates combined resources from all MOU Partners. The South Shore region will use a 'Segmented Industry-Approach', where business customers will be identified by industry clusters, then, those industries will be contacted, assessed and serviced by the Business Services Representatives in accordance to their specific needs.

Business Service Representatives will reach out to the companies, make the appropriate contacts to discover their workforce needs and provide the appropriate services that addresses their specific needs.

All job seeker customers will be encouraged to participate in a career pathway model, thereby providing business customers with a quality pipeline to job-ready candidates to fill open positions. Further, skills training programs will be based on a comprehensive needs assessment of businesses to ensure that programs offered by training vendors are demand-driven and match the stringent requirements of the marketplace. MOU Partners will refer their clients to the SSCC by way of a negotiated customer flow process. This will ensure consistency and quality referrals to business customers.

WIOA Partners and the SSCC will:

- Develop an effective outreach program that consistently determines the employment needs of businesses in the region and the skillsets required to address those needs.
- Coordinate the delivery of business services among Partners to create a streamlined approach to interact with businesses and convey available resources and job candidates.
- Enter job orders into the system and coordinate matching with job seeker skill sets.
- Ensure the effective collection of job seeker profiles and matching with job orders.
- Consistently review Labor Market Data to understand the needs of businesses.
- Collaborate to ensure training programs provided meet the needs of available employment opportunities as identified by area employers.
- Consistently monitor business services to determine if the needs are being properly and effectively met.
- Set a model of evaluating the effectiveness of Individual Training Account (ITA) vendors through student interviews, and addressing the skill needs of business.

**A detailed process to interact with area businesses and refer individuals to employment opportunities among partners will be developed in the coming year and incorporated as an addendum to this MOU as appropriate.**

## **IX: ACCESS TO TECHNOLOGY**

The availability of Technology platforms is a critical component to the successful coordination and delivery of programs and services among the SSWDB, SSCC and Partners. Technology will facilitate the exchange of information and the effective continuum of services among shared customers and businesses.

Technology systems will be selected with the following priorities in mind:

- An effective Content Management System to collect and access business and job seeker profiles.
- Shared platforms that link Partner services, educational programs and counseling.
- Comprehensive tracking of customers through the workforce system to support their individualized Career Path and objective to achieve sustainable employment.
- Provide resources, services and training through virtual technology, social media and at alternative times when SSCC and Partner facilities may not be available.
- Remain in compliance with applicable statutes, regulations, data security requirements and standard reporting principles.
- Information generated is flexible, expandable and is easily shared among Partner organizations.
- Provide technology that addresses the needs of shared customers that may have barriers to employment such as those who are visually impaired.

The Data and Training Committee is currently working on policies and procedures in which to more effectively collect and share data, as well as create the appropriate training and career pathway opportunities for target populations in our region. The Committee surveyed all partners in an effort to better understand the various data collection and reporting platforms utilized to determine if a unified approach can be implemented in the region. The results of the survey identified a variety of platforms in use by partners, reinforced the belief that the development of better and more accurate data collection to create meaningful outcome measurements needs to be addressed on a state level in support of local initiatives.

The Committee is in the process of analyzing this information and establishing a recommendation on the technology tools and resources required to create a more effective and comprehensive data sharing and overall communication system among all MOU Partners in the region. In March, 2018 the Committee conveyed an opinion letter to the Department of Career Services, which summarized their findings and requested assistance. A copy of this correspondence is included for information purposes in this Amendment under **Attachment E in Appendix E**.

**A Technology Plan with associated costs will be developed in the coming year and incorporated as an addendum to this MOU as appropriate.**

## **X: STAFF DEVELOPMENT AND TRAINING**

A coordinated and comprehensive Staff Development and Training program will provide the tools, resources and skillsets for all SSCC and Partners staff to work cooperatively and effectively in the delivery of high quality service to all customers. The training will include the following and will be implemented on a regular schedule throughout the calendar year:

- Consistent information/update on Partner resources, services and information.
- Referral process for shared customers and business services.
- Information Technology, data collection and data reporting.
- Sensitivity and cultural competency training to effectively address the needs of all customers.
- Business Demands and Labor Market Information.
- Target Population data and customers served.
- Workforce System goals, objectives, updates and changes.
- Education and training programs, services and opportunities in the region.

## **XI. COMPETITIVE SELECTION OF ONE-STOP CAREER CENTERS**

The WIOA Required Partners agree to participate in the selection process of One-Stop Operators as required by WIOA, at least once every four years.

## **XII. PERFORMANCE MEASURES**

The SSWDB, in agreement with the Required Partners, agree to jointly review the WIOA mandated performance metrics for the workforce areas or metrics as negotiated as part of any shared and infrastructure contract costs between the SSWDB and the SSCC, including incentives and penalties.

See Appendix D for FY 2017/2018 Proposed Performance Goals as submitted to the State. Performance Goals for 2018/2019 were not available at the time of submitting this updated MOU Agreement.

In addition, performance metrics could also include “transition metrics” that follow participants across education and training, employment and self-sufficiency.

Such indicators will measure:

- A. Postsecondary enrollment
- B. Course completions and graduation rates
- C. Skill level attainment
- D. Attainment of stackable credentials
- E. Employment and earnings
- F. Job retentions

**Detailed Performance Metrics will be identified and further developed in the coming year and incorporated as an addendum to this MOU as appropriate.**

### **XIII: SHARED COSTS**

Shared Costs by the MOU “Required Partners” consist of infrastructure and service costs associated with the SSCC operations, those associated with the delivery of shared workforce development programs and services as required by WIOA in support of the One-Stop delivery system. The purpose of the financial contributions is to meet the needs of Shared Customers, ensure proportionate costs by Required Partners, support an effective Career Pathway system, reduce duplication of services and provide efficient use of technology.

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 the all “Required Partners”. To ensure that the Local Board and all the required local Partners can focus on the provision of quality services to our shared customers, the State Level Partners will issue allocations for shared and infrastructure cost to the 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 Inter-agency Service Agreements (ISAs) with the DCS, 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.

As part of this MOU Agreement the SSWDB and SSCC are engaging with a variety of “Non-required Partners” as well to identify individualized resources that will provide effective and coordinated services to Shared Customers. Additional accommodations that may require additional cost by Partners include office space within one or more of the SSCC facilities, shared or new equipment, other associated programming and service delivery adjustments. Contributions for shared costs will also come in the form of shared staff for training and meetings and in-kind services.

“Non-required Partners” are not responsible for any Shared Costs, unless they are outlined in the specialized resources section located in Appendix A. The identified specialized accommodations may have an additional cost requirement by the Partner, which will be outlined in a separate addendum to this Updated MOU Agreement once it is determined after the July 19, 2018 effective date. Local funding agreements must satisfy the requirements of Section 121(h) of WIOA for purposes of funding the One-Stop delivery system in FY18.

### **XIV. SIGNATORIES**

By signing the MOU, all Parties agree to reviewing and modifying the local MOU on an as-needed basis to ensure further development and alignment with local area priorities and strategies to serve shared customers as well as to update the MOU to satisfy all requirements as identified by WIOA.

## SIGNATORIES

By signing this agreement, all parties agree to the provisions contained herein are subject to all applicable, Federal, State, and local laws, regulations and/or guidelines relating to nondiscrimination, equal opportunity, displacement, privacy rights of participants, maintenance of data and other confidential information relating to OSCC customers. By signatures affixed below, the parties specify their agreement:

### Required Partners

\_\_\_\_\_  
Mayor Thomas P. Koch  
Chief Elected Official, City of Quincy



\_\_\_\_\_  
Donald P. Uvanitte  
SSWDB, Board Chair

\_\_\_\_\_  
Dean Rizzo  
SSWDB, Executive Director



\_\_\_\_\_  
Kevin J. Parham  
South Shore Career Center, Lead Operator

\_\_\_\_\_  
Francis Grey  
DCS, Operations Manager

\_\_\_\_\_  
Richard Jeffers, Director  
DUA

\_\_\_\_\_  
Jennifer Harris, Library Director  
Plymouth Public Library



\_\_\_\_\_  
Julie Proud-Ray, Area Director  
MA Rehabilitation Commission

\_\_\_\_\_  
Sabre A. Ibrahim, Director  
MA Department of Transitional  
Assistance – Plymouth Area Office



\_\_\_\_\_  
Karyn Gonzalez, Director  
MA Department of Transitional Assistance  
Quincy Area Office

\_\_\_\_\_  
Joan Cirillo, President & CEO  
Operation A.B.L.E.

\_\_\_\_\_  
Kun Chang, MSW, LCSW, Program  
Director  
Greater Boston Chinese Golden Age Center





Nathan Stowell, Program Director  
Training Resources of America, Inc.  
Youth Build



Kristen Schlapp, Program Director  
Quincy Community Action Programs, Inc.



Susan L. Hearn, Executive Director  
Randolph Community Partnership, Inc.

Susan Patton, Director  
Rockland Public Schools



Alan White, Regional Director  
MA Commission for the Blind

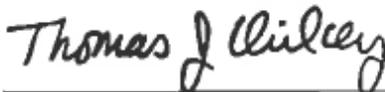
Paula Shiner, CEO  
Coastline Elderly Services, Inc.

**Non-Required Partners**



Jack Cocio, Executive Director  
South Shore Community Action  
Council, Inc.

Lisa McBirney,  
Quincy College



Thomas Hickey, Superintendent  
South Shore Vocational Technical High  
School



Keith Segalla, Executive Director  
Career & Technical Education  
Quincy Public Schools

Michael Bellotti, Sheriff  
Norfolk County Correctional Facility

April Connolly, Chief Operating Officer  
Father Bill's & MainSpring, Inc.



Vincent Harte, Executive Director  
Wellspring Multi-Service Center

Garreth Lynch, Executive Director  
Plymouth Boys and Girls Club



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Elijah Wilkerson, Admissions Counselor  
Job Corps



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Grace McAuliffe, Director of Finance  
Quincy Housing Authority

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William Mitchell, Interim President  
Massasoit Community College



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Carreen Reinhold, Chair  
South Shore Collaborative on Employment



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Giles Li, Executive Director  
Boston Chinatown Neighborhood Center



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Philip Chong, CEO  
Quincy Asian Resources, Inc.

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Eugene Gloss, Co-Chair  
South Shore Collaborative on  
Employment



# Appendix



# **Appendix A**

## **Summary of individualized Considerations for**

### **Required and Non-required Partners**



## **Special Considerations for Required and Non-required Partners:**

The SSWDB and SSCC are consistently engaged with a variety of Required and Non-required Partners in order to provide coordinated services to Shared Customers. This MOU Agreement outlines a variety of initiatives designed to increase collaboration and the implementation of services and resources for businesses, job seekers and youth in the region.

Appendix A identifies individualized accommodations between the SSCC, SSWDB and individual Partner to effectively address the needs of the Shared Customers. Such accommodations outlined include providing office space within one or more of the SSCC facilities for Partner Staff, shared and new equipment, SSCC providing Career Center Services workshops at Partner locations, and other associated programming and service delivery adjustments.

Outlined within Appendix A are these individualized accommodations determined at the time of signing this MOU.

Local funding agreements must satisfy the requirements of Section 121(h) of WIOA for purposes of funding the One-Stop delivery system in FY19.

## Partner Name: Department of Transitional Assistance (DTA)

  X   Required             Non-Required

### Individual Accommodations:

- DTA will designate a Full Engagement Worker (FEW) and the Quincy OSCC will assign a “lead staff person” to work together on behalf of the DTA clients.
- Co-location of designated FEW will go to the Quincy OSCC facility to provide support, information and resources to OSCC staff and DTA clients. (Initially, they are not required to enter information into the MOSES application); a FEW from the Quincy DTA office will be at the Quincy OSCC once a week and on an as-needed basis in the Plymouth OSCC.
- Designated space will be needed at the Quincy OSCC for the FEW to co-locate at agreed upon schedule – once a week.
- Participation of the Quincy OSCC “lead staff person” will be available at the Quincy DTA office during the bi-weekly client Orientations (Tuesday’s @10:00am & Thursday’s @1:00pm) to share information about the Quincy OSCC services, available programs and to recruit eligible participants.
- The Quincy OSCC “lead staff person” for DTA and DTA clients will be trained on DTA programs/requirements to better assist the DTA population.
  - Training will include eligibility, work program participation and other requirements of the TAFDC and SNAP programs.
- Establishing jointly agreed upon referral mechanisms between DTA and the OSCC.
- DTA to work with OSCC to establish a case record for each participant documenting activities, records, evaluations, test results and case narratives.
- Collaboratively work to ensure the TAFDC and SNAP clients receive tailored and appropriate job readiness, job matching and job coaching skills.
- Collaboratively work to address any challenges for TAFDC and SNAP clients to participate in OSCCs activities such as transportation and child care. (These services are to be determined by the FEW, as not all clients are eligible for these.)
- Access to information on DTA programs, services and resources will be made available at the OSCCs (flyers, links)
- Between BEACON and MOSES, clients will have established case records to reflect activities, evaluations, rest results and any important facts pertaining to their services noted in a Case Narrative.
- OSCC to generate a report of DTA client participation including placement and outcomes which will be given to the FEWs for follow-up with the client. (An agreed upon format TBD)
- OSCC to review, verify and sign the participation forms for the registered clients to ensure that the client is attending as required. (DTA will inform the OSCC of the required hours of participation for each client referred.)
- MOSES training to be held as needed for DTA staff
- BEACON, DTA Policy and Procedure training to be held for OSCC staff
- Establish a priority access for DTA clients – fast track because of the pre-screening which is completed by the DTA staff/FEW.
- Coordinate SNAP funding for workforce training and career planning with OSCC services.

## Partner Name: Massachusetts Rehabilitation Commission (MRC)

  X   Required             Non-Required

### Individual Accommodations:

- MRC will provide consultation and technical assistance to assist SSCC in ensuring facilities are accessible to clients with disabilities and will work with SSCC to determine and address shared consumers' needs for reasonable accommodations.
- MRC will coordinate with SSCC staff to arrange group tours and programs at the SSCC facilities to better accommodate MRC clients.
- MRC provides specialized vocational rehabilitation services consistent with collaboratively developed Individualized Plans of Employment (IPE). MRC will work with the SSCC and Partner agencies for referral of MRC services to shared customers and vice versa.
- SSCC staff will be available, upon request, to conduct the Career Center Seminar (CSS) at the local MRC offices.
- MRC and SSCC will work collectively to ensure training dollars are utilized to most effectively help shared customers meet the needs of the business sector.
- MRC and SSCC will work collectively to ensure shared customers have the assistance needed to complete Job Quest registration requirements.
- MRC will provide guidance and assistance in ensuring SSCC staff is properly trained to address the needs of individuals with disabilities, who are shared consumers, in an appropriate and respectful and effective manner.

#### 1. **Required MOU Components: All Required Partners are Included.**

**Expectation:** none listed

**MRC's Response:** MRC is a required partner and will participate in the local area and will contribute to the local service delivery strategies. MRC will provide information regarding our services and will contribute vocational counseling and guidance for eligible consumers. MRC counselors will develop individual employment plans and services to assist consumers to establish a vocational goal toward competitive integrated employment and will monitor the plan to completion.

#### 2. **Required MOU Components: Description of the process to develop the local MOU, career pathway models for populations, and shared customer definitions.**

**Expectation:** A description of the process used to develop the MOU. Outlines schedule of meetings, agenda items, and course of action culminating in signed MOU.

**MRC's response:** MRC local area assigned staff worked with the workforce team to establish a schedule of meetings and agenda as well as a course of action resulting in a successful MOU. Career Pathway services were established for all populations served along with shared definitions of consumers. MRC's responsibility as part of the MOU will be to provide vocational and rehabilitation employment services for people with

disabilities determined eligible for our services in each local area. MRC provided input to each local team to establish the process utilized to develop and complete the MOU.

- 3. Required MOU Components: Description of the priority populations identified by the MOU Partners. At a minimum, WIOA requires that each local MOU address: unemployment insurance claimants, low-income adults including TANF and SNAP recipients, homeless, Adult Education participants (Title II), individuals with disabilities (Vocational Rehabilitation Title IV), Veterans, older workers, re-entry populations and, youth, including youth with barriers to employment.**

**Expectation:** A description of the priority populations to be served in the local area. A list of the priority populations will not suffice. Describes the educational and service needs of each priority population and describes how the priority populations will benefit from career center services, and/or how career center services may need to be differentiated to meet needs of specific priority populations.

**MRC's response:** MRC serves individuals with disabilities identified as part of the population served under WIOA. To receive MRC services, these individuals must meet eligibility requirements. MRC assists these individuals in obtaining competitive integrated employment and to that end, services provided are based on individuals needs and could include but are not limited to: assessment, counseling and guidance, job placement, training, education, financial assistance towards post-secondary education, adaptive equipment and extended supports. The priority population might benefit from these services by participating in job driven trainings based on industry needs in the local labor market. MRC will collaborate with our workforce partners to meet the individual needs of shared consumers. Career Centers must ensure that facilities, technology, and training curricula are accessible for individuals with disabilities. MRC will provide subject matter expertise to the Career Centers to address accessibility issues based on individual needs such as Dragon, JAWS, ASL, and other adaptive equipment and devices.

- 4. Required MOU Components: Description of the continuum of services available for each priority population in the local workforce area based on a customer-centered design or career pathway model. Include a map for customer flow across MOU partners for each priority population.**

**Expectation:** Provides a description for criteria used to identify individuals as shared customers and how this information is captured and shared in intake/assessment/referral process. Identifies the roles and responsibilities each Partner will commit to in order to support the education and service needs necessary to provide a continuum of services for each priority population. Customer flow charts included.

**MRC's response:** MRC will track individuals referred to and from the Career Centers and those determined eligible for services and have a plan for employment in our case management system (MRCIS). MRC has the ability to run reports on shared customers and can provide information on a regular basis to our partners as needed until such time

as we have a system that can capture information across partnering agencies such as a dashboard. MRC can provide career counseling and guidance, assessments, referrals, training, job placement, education, financial assistance towards post-secondary education, and adaptive equipment for eligible consumers. These will be incorporated into a career pathways plan along with services that might be provided by our partnering organizations based on our shared consumer's needs. Individuals with disabilities might need ESL classes, adult basic education, or can benefit from TANF/SNAP, transition services from schools, pre-employment services, and other opportunities offered by our partner organizations. MRC will ensure appropriate referrals for the continuum of services offered or available through our partners in the local service areas. MRC provides these services to individuals determined eligible under federal VR standards.

5. **Required MOU Components: Description of the continuum of services available for businesses in the workforce area based on a customer-centered design or career pathway model.**

**Expectation:** Describes plan to identify lead point of contact responsible for employer engagement and response processes, as well as process to coordinate job development, recruitment and referral, and follow-up across Partners. Includes business services flow chart.

**MRC response:** MRC has a robust employer engagement strategy and response process that continues to be effective for placing individuals with the most severe disabilities into employment. MRC will partner with the WIOA organizations on strategies to meet large scale business needs in the workforce areas, including partnering for skills development and identifying and preparing individuals with disabilities who are MRC consumers for available jobs in the local workforce area.

6. **Required MOU Components: Description of access to technology and materials available through OSCC delivery system.**

**Expectation:** Describes customers' access to technology currently available at the OSCC. Includes specific information with regard to any technology that is or can be customized or priority populations.

**MRC response:** MRC will provide subject matter expertise to the Career Centers to address accessibility issues based on individual needs such as Dragon, JAWS, ASL, and other adaptive equipment and devices, and etc.

7. **Required MOU Components: Plan for coordinated staff development and training.**

**Expectation:** Includes plan for initial and ongoing information sharing between Partner program staff. Plan includes strategies to share information about Partner organizations as well as individual customer information.

**MRC response:** MRC will provide orientation to our services to Career Center staff and will participate in Career Center information training sessions to ensure appropriate referrals and ongoing information sharing between Partner program staff. MRC will track individuals referred to and from the Career Centers and those determined eligible for services and have a plan for employment in our case management system (MRCIS). MRC has the ability to run reports on shared customers and can provide information on a regular basis to our partners as needed until such time as we have a system that can capture information across partnering agencies such as a dashboard.

**8. Required MOU Components: Assurances of participation of the OSCC Required Partners in the competitive selection process for the OSCC lead operator in the local workforce area.**

**Expectation:** none listed

**MRC response:** MRC area directors are actively involved in the competitive selection process for the OSCC lead operator in the local workforce area.

**9. Required MOU Components: Plan or interim plan to address shared and infrastructure costs.**

**Expectation:** none listed

**MRC response:** MRC senior leadership is addressing shared and infrastructure costs for the local areas. This is not a responsibility of the local areas.

**10. Required MOU Components: Duration of the MOU including commencement and termination date, and include the clause “unless otherwise terminated by agreement of all parties or superseded.”**

**Expectation:** none listed

**MRC response:** MOU will include commencement and termination date and the clause “unless otherwise terminated by agreement of all parties or superseded.”

**11. Required MOU Components: Assurances that the MOU review will occur not less than every three years.**

**Expectation:** none listed

**MRC response:** MRC will assure that the MOU review will occur not less than every three years.

**12. Required MOU Components: Other provisions agreed to by all parties that are consistent with all Partner programs’ services and activities, authorizing statutes and regulations.**

**Expectation:** Includes process, timeline, and goals for Partner participation in local priority areas (e.g. coordinated professional development, employer engagement, workplace readiness development, etc.)

**MRC response:** MRC will work with partners on process, timeline, and goals for Partner participation in local priority areas (e.g. coordinated professional development, employer engagement as it relates to strategizing to meet large or broad scale employer needs in local areas, to meet skills needs and ensuring that persons with disabilities have opportunity for skill development and employment based on employer needs and etc.)

**13. Required MOU Components: Includes all requirements as set-forth in WIOA MOU policy guidance.**

**Expectation:** none listed

**MRC response:** MRC will ensure that all requirements as set forth in WIOA MOU policy and guidance are followed.

**14. Required MOU Components: MOU reflects an agreement of the MOU 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 (Board) and the mandated OSCC Partner, including incentives and penalties.**

**Expectation:** At this early stage there should be evidence of planning to jointly review performance metrics and other metrics negotiated as part of shared and infrastructure funding agreements.

**MRC response:** The MOU amongst the partner agencies will be jointly reviewed and include performance metrics for each region negotiated as part of the shared infrastructure costs.

**Partner Name: Massachusetts Commission for the Blind (MCB)**

  X      **Required**                      **Non-Required**

**Individual Accommodations:**

- MCB is to ensure that the SSCC facilities are accessible to clients with visual impairments and provide equipment, technology and services to the SSCC as may be required to provide reasonable accommodations to serve the needs of shared customers.
- MCB will coordinate with SSCC staff to arrange group tours and programs at the SSCC facilities to better accommodate MCB clients.
- MCB provides specialized vocational rehabilitation services consistent with collaboratively developed Individualized Plans of Employment (IPE). MCB will work with the SSCC and Partner agencies for referral of MCB services to shared customers and vice versa.

- SSCC staff will be available, upon request, to conduct the Career Center Seminars (CSS) at the local MCB offices.
- MCB and SSCC will work collectively to ensure training dollars are utilized to most effectively help shared customers meet the needs of the business sector.
- MCB and SSCC will work collectively to ensure shared customers have the assistance needed to complete Job Quest registration requirements.
- MCB will provide guidance and assistance in ensuring SSCC staff are properly trained to address the needs of their clients in a respectful and effective manner.

**Partner Name: Operation A.B.L.E**

  X      **Required**                      **Non-Required**

**Individual Accommodations:**

- SCSEP will offer ongoing program orientations at the SSCC.
- SCSEP will provide appropriate referrals to SSCC and WIOA partner agencies.
- SCSEP will welcome appropriate referrals from SSCC and WIOA partner agencies.
- SCSEP will identify and provide ongoing support for WIOA shared customers.
- SCSEP will continue to outstation program staff at the SSCC as per a negotiated schedule.
- SCSEP will continue to place program participants at the SSCC on an as needed basis.
- SCSEP staff will participate in SSCC staff cross program training activities.

**Partner Name: Department of Unemployment Assistance (DUA)**

  X      **Required**                      **Non-Required**

**Individual Accommodations:**

Any other provision in this agreement notwithstanding:

1. DUA only will provide information under this agreement to another party to this agreement:
  - a. upon the determination by the DUA Director that the information lawfully may be provided in accordance with applicable law, including, but not limited to, G.L. c. 151A, §14P and §46, and 20 C.F.R. Pt. 603;
  - b. following approval by DUA of an Application for Unemployment Insurance and/or Wage Reporting Data (currently in the form attached and marked “ , ” which DUA reserves the right to modify in its sole discretion); and

- c. following execution by DUA and an approved applicant of a Data Sharing and Cost Reimbursement Agreement (currently in the forms attached and marked “ ” for confidential data and “ ” for nonconfidential data, which DUA reserves the right to modify in its sole discretion).
2. DUA will not be bound by any provision of this agreement that does not expressly mention DUA by name.

**Partner Name: Plymouth Public Library**

Required       Non-Required

**Individual Accommodations:**

- SSCC staff will be available, upon request, to conduct the Career Center Seminars (CSS) at the Plymouth Public Library.
- The Plymouth Public Library Advisor will bring groups of clients into the PCC periodically for an introduction of the available resources and services.

**Partner Name: Training Resources of America, Inc.**

Required       Non-Required

**Individual Accommodations:**

- The Training Resources of America Outreach worker will bring groups of clients into the QCC periodically for an introduction of the available resources and services.
- The SSCC staff will effectively and consistently convey TRA resources and services to SSCC clients.
- SSCC staff will be available upon request to conduct career center seminars at Training Resources of America offices.

**Partner Name: Quincy Community Action Programs, Inc. (QCAP)**

Required       Non-Required

**Individual Accommodations:**

- The Quincy Community Action Program, Inc. (QCAP) staff will bring groups of clients into the QCC periodically for an introduction of the available resources and services.
- SSCC staff will be available upon request to conduct the Career Center Seminar at the QCAP offices.

- QCAP and SSCC will better connect the QCAP REACH Program to clients of the SSCC through enhanced communication and outreach efforts.
- The SSCC will effectively and consistently convey the QCAP resources and services to SSCC customers.
- QCAP will work with the SSCC to provide Outstationing to the South Shore region that will connect SSCC clients to Adult Education programming in the region, while also connecting Adult Education students to the SSCC.

**Partner Name: Greater Boston Chinese Golden Age Center**

  X   Required             Non-Required

**Individual Accommodations:**

- SSCC staff will be available upon request to offer specialized Career Center Seminars to the clients of the Greater Boston Chinese Golden Age Center (GBCGAC), which are primarily Asian.
- GBCGAC and SSCC will coordinate services to help the clients register in Job Quest.

**Partner Name: Rockland Public Schools**

  X   Required             Non-Required

**Individual Accommodations:**

- The SSCC staff will be available upon request to conduct Career Center seminars at the Rockland Regional Adult Learning Center (RRALC).
- The SSCC staff will effectively and consistently convey RRALC resources and services to SSCC clients.
- The RRALC Advisor will effectively and consistently convey SSCC resources and services to RRALC students.

**Partner Name: Father Bill’s & MainSpring, Inc.**

       Required        X   Non-Required

**Individual Accommodations:**

- Father Bill’s & MainSpring, Inc. will partner with the South Shore Workforce Development Board and WIOA Partners to identify shared customers.

- Father Bill’s & MainSpring, Inc. will assist in developing an agreed upon referral process for shared customers that ensures customers receive effective support and that referral partners receive only appropriate referrals.
- Father Bill’s & MainSpring, Inc. will provide data and an account of previous partnerships with Career Centers that were designed to provide added support to homeless customers in order to evaluate future opportunities with the South Shore Workforce Development Board in enhancing services to this population.

**Partner Name: Quincy College**

\_\_\_\_\_ **Required**        X   **Non-Required**

**Individual Accommodations:**

- Quincy College and the SSCC will work collectively to design and implement comprehensive programs that will deliver career pathways program for unemployed, underserved resident in the South Shore.
- Quincy College will develop the best career pathways that reflect the demand of the employment needs.
- Quincy College will provide low income underserved clients residing in the South Shore region, access to higher-paying jobs in the retail industry via a college credit customized training program.
- Quincy College will deliver wrap around services to low income clients, by enabling them to be trained and become employable for a greater variety of skilled and better-paying career-track jobs in the retail industry.
- Quincy College will support students in persisting on an education career pathway by providing motivational support and counseling, as well as access to needed social services and academic support, including basic skills development.
- Quincy College is seeking participate in the regional needs assessment report (either in manufacturing, STEM or health care). By working with the Institutional Research Department at the College, we will provide valuable information related to the South Shore’s labor market needs.
- The SSWDB will assist in course/program design curriculum and its activities based on the South Shore regional needs.
- The SSWDB will assist with making the connection between the employers in the South Shore region and Quincy College.
- The SSWDB will assist with Regional need assessment plans.

**Partner Name: South Shore Community Action Council, Inc.**

       Required   X   Non-Required

**Individual Accommodations:**

- SSCC staff will be available upon request to conduct the Career Center Seminar at the SSCAC offices.
- SSCAC will encourage collaborations among agency partners in the region with staff and resources provided by the SSCC.
- SSCAC will provide workshop space accommodations at their facility as available for the SSCC to conduct trainings and associated programming for shared customers in the region.

**Partner Name: Quincy Public Schools**

       Required   X   Non-Required

**Individual Accommodations:**

- SSCC will ensure there is an effective referral process to link shared customers with the education programs offered by Quincy Public Schools.
- Quincy Public Schools will provide workshop and presentation space accommodations within their facilities as available for the SSCC to conduct trainings and associated programming for shared customers in the region. (cost for room usage may be applied depending on program and set up requirements)
- Quincy Public Schools will provide office space accommodations within their facilities as available for shared staff to meet the needs of shared youth customers.

**Partner Name: South Shore Vocational Technical High School**

       Required   X   Non-Required

**Individual Accommodations:**

- SSCC will ensure there is an effective referral process to link shared customers with the education programs offered by South Shore Vo-tech.
- SSWDB, SSCC and South Shore Vo-tech will work collaborative to research the needs of vocational industries in the region and shape curriculum and training to meet the identified needs.
- South Shore Vo-tech will provide workshop and presentation space accommodations within their facilities as available for the SSCC to conduct trainings and associated programming for shared customers in the region.

**Partner Name: Boston Chinatown Neighborhood Center (BCNC) – Quincy**

       **Required**              X   **Non-Required**

**Individual Accommodations:**

- BCNC staff will bring groups of students from Quincy and Boston to the QCC periodically for an introduction to the available resources and services.
- SSCC staff will be available upon request to conduct the Career Center Seminar at BCNC offices.
- BCNC and SSCC will improve the connection with upper-level ESOL students through enhanced communication and outreach efforts.
- SSCC will effectively and consistently convey BCNC resources to SSCC customers.

**Partner Name: South Shore Collaborative on Employment (SSCE)**

       **Required**              X   **Non-Required**

**Individual Accommodations:**

- The SSCE will continue to maintain a focus on customers with disabilities who are unemployed and underemployed.
- A representative of the SSWDB will participate in the South Shore Collaborative on Employment.
- The South Shore Collaborative on Employment Employer Liaison will work collaboratively with the South Shore Career Centers to identify business needs and employment opportunities.
- The South Shore Collaborative on Employment will encourage partners to refer job seekers to the South Shore Career Centers and to support access to resources available through the workforce development system.
- The South Shore Collaborative on Employment will provide disability orientation and training as needed for the SSWDB, the South Shore Career Centers and employers as requested.
- SSEC in partnership with SSWDB will work together to ensure measurement of joint partnership and individuals served.
- SSCE and SSWDB will jointly share information regarding emerging businesses and business trends and work towards training individuals to meet business needs in a proactive manner.
- SSCE will participate in employment sector meetings, manufacturing, medical financial, hotel, retail, etc.
- SSWBD will attend four SSCE Steering Committee Meetings quarterly.



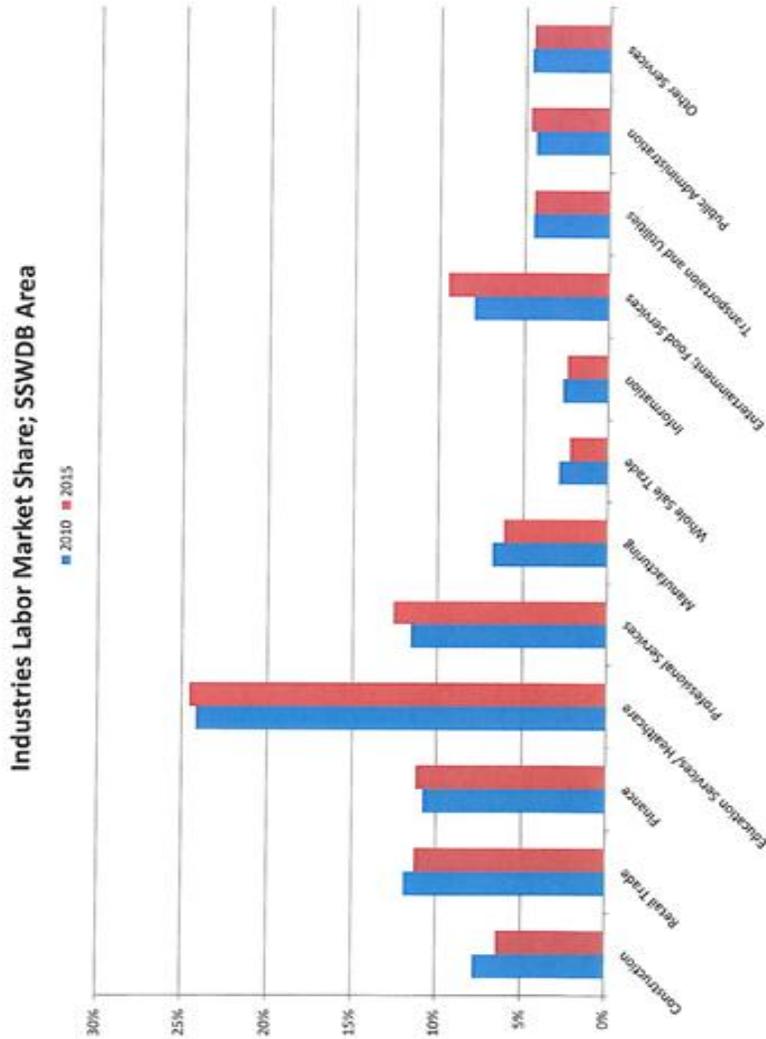
# **Appendix B**

## **Local Market Data**

**Note: The SSWDB will be conducting a complete LMI Data Analysis for the South Shore Service Delivery in July/August 2018. The information generated will be incorporated into this Local MOU Agreement at the appropriate time.**

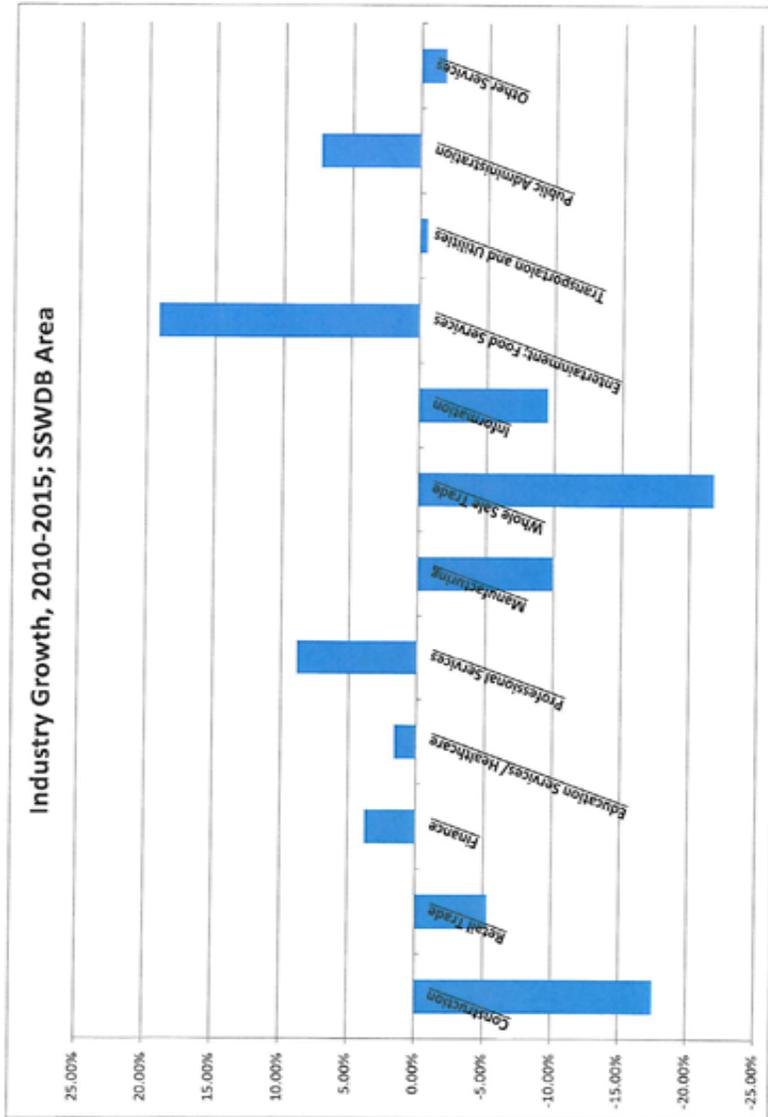


# SSWDB Labor Market Share for the Region



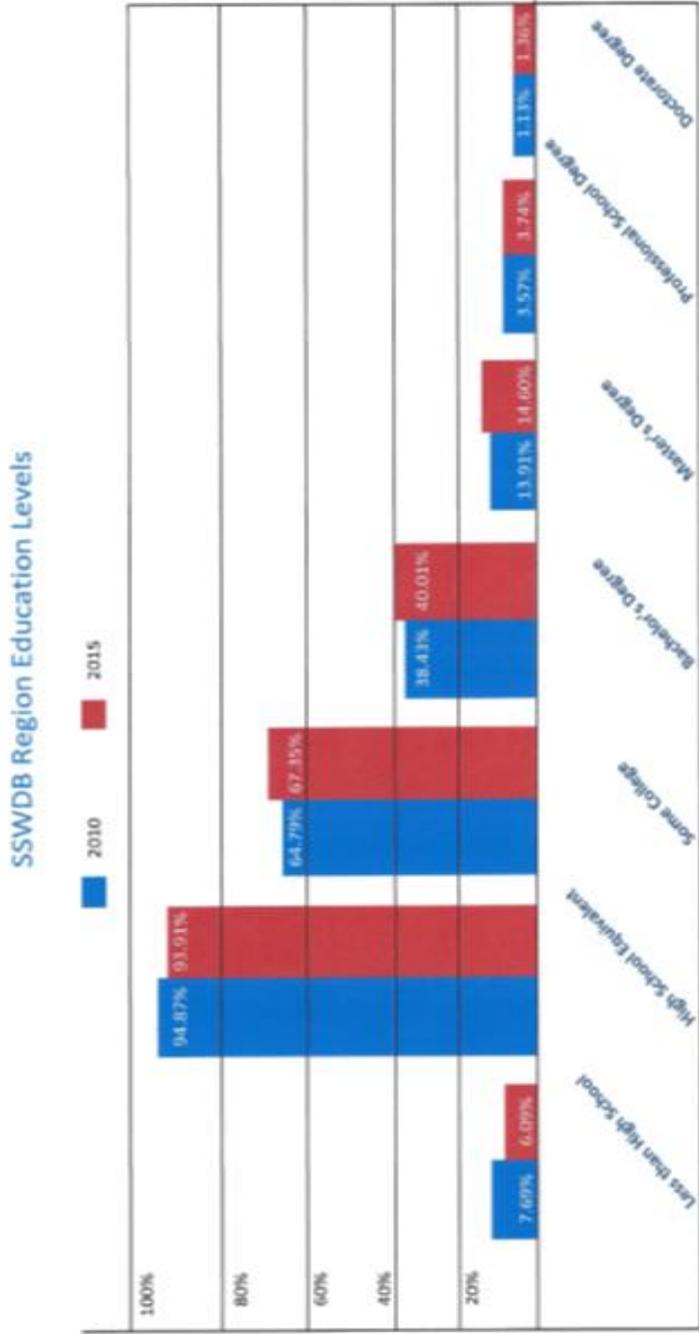


# SSWDB Industry Growth in the Region





# SSWDB Education Levels within the Region





**Appendix C**

**SSCC**

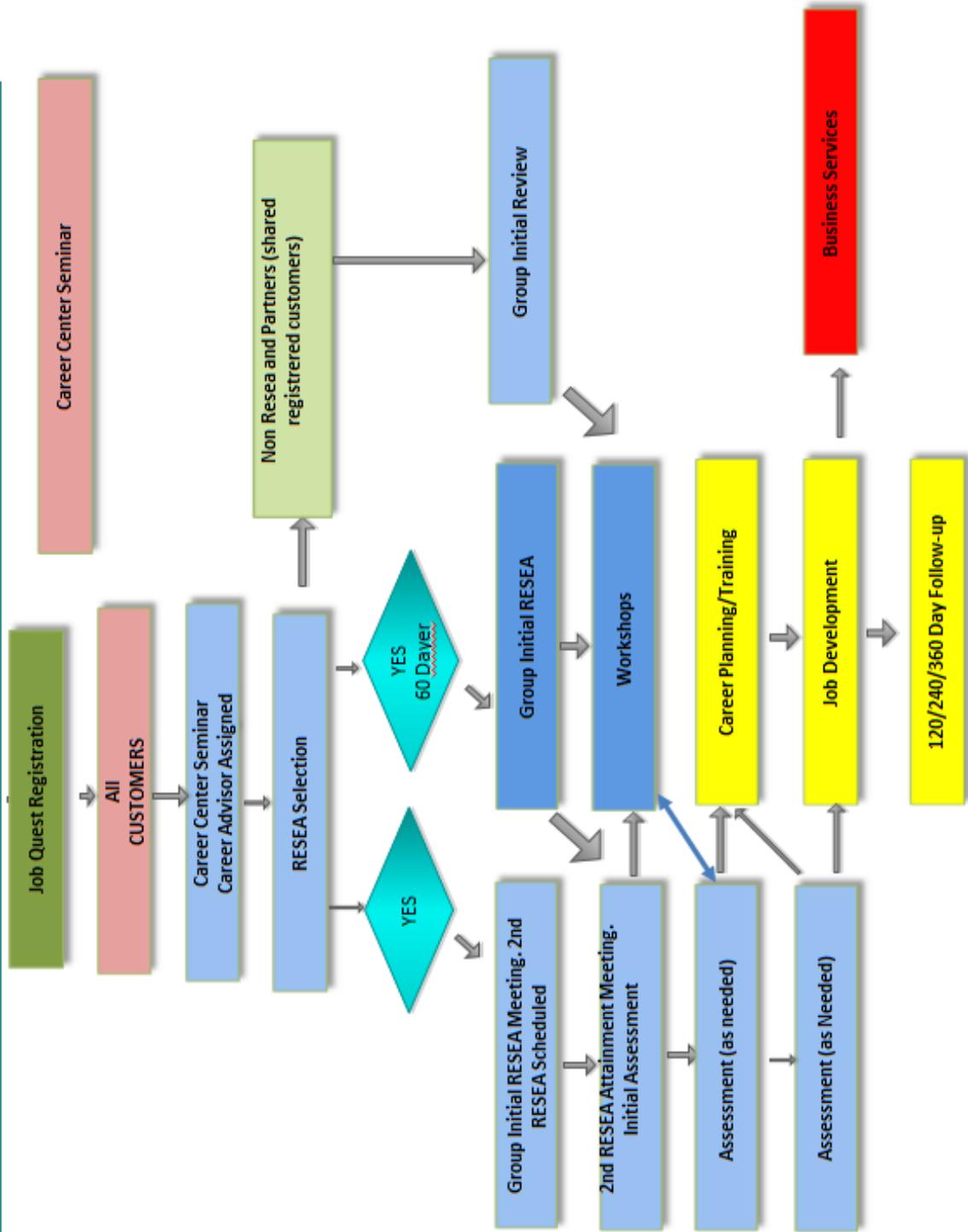
**Customer Flow**

**&**

**Service Delivery**



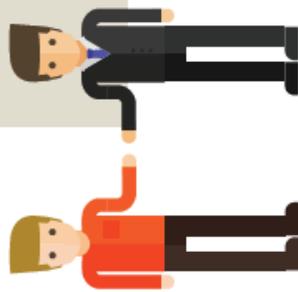
# One – Stop WIOA Customer Flow and Service Integration Front Desk







WELCOME



# Pathways to SUCCESS!

Your path to gainful employment when you register with the South Shore Career Centers



**Register on Job Quest**  
Access Resources, Events and Job Listings

**Attend Career Center Seminar**

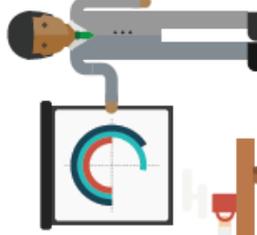
- Are You a **Veteran?**  
Meet with a **Veteran Specialist**  
Priority Care Management  
Services for **Veterans and Spouses of Veterans**
- Are You **14-24?**  
Meet with a **Youth Specialist**
- Are You a **Jobseeker** who is **unemployed or seeking career advice?**  
Are you a **Migrant or Seasonal Farm Worker?**  
Intensive case management services available



**Career Planning Individualized Services**  
Develop a Career Pathway  
Apprenticeship Programs  
Access On-the-Job Training  
(Based on Eligibility)



**Seminars & Workshops**  
Resume Writing  
Interview Techniques  
Computer Basics  
Financial Literacy



**Job Training**  
Enhance your Skillset by Taking a Course at Registered Education and Training Facilities (Based on Eligibility & Funding)

**Resource Library**  
Computer Access  
Career Search  
Copier and Fax Service  
Job Postings

**Community Partners Supportive Services**  
Housing  
Transportation  
Healthcare  
Postsecondary Education  
HSET/CEED Preparation  
ESOL Classes

## Direct Access to Free Services and Resources:

### Apply Your New Skills and Training

**Networking**  
Career Fairs  
Specialized Hiring Events  
Job Club

**Job Matching**  
Your Career Advisor and Our Business Service Team assists you with Employment Opportunities

South Shore **SSCC** Career Centers  
Plymouth County  
South Shore Career Centers  
Quincy, MA (617) 745-4000  
Plymouth, MA (508) 734-5300  
SSCareerCenters.org

South Shore **wdb** Workforce Development Board  
South Shore Workforce Development Board  
Quincy, MA (617) 328-7000  
SouthShoreWDB.org



**OBTAIN A JOB** ★



# **Appendix D**

## **Performance Goals**

**FY 2018**



**ATTACHMENT J1**

WIOA - LOCAL AREA FY2017/FY2018 PROPOSED PERFORMANCE GOALS REQUEST FORM					
<b>CONTACT PERSON / EMAIL:</b> Dean Rizzo / drizzo@sswib.org					
<b>WORKFORCE BOARD NAME:</b> South Shore Workforce Development Board					
<input checked="" type="checkbox"/> Accept Statewide Goals FY2017 <input checked="" type="checkbox"/> Accept Statewide Goals FY2018					
A PERFORMANCE MEASURE	STATE			LOCAL AREA	
	B FY 2017 STATE GOAL	C FY 2018 STATE GOAL	D PROJECTED LOCAL GOAL FROM FY2016 DATA	E FY2017 PROPOSED LOCAL GOAL	F FY 2018 PROPOSED LOCAL GOAL
<b>WIOA ADULT MEASURES</b>					
Employment Q2	83%	86%	83%		
Employment Q4	75%	77%	75%		
Median Earnings Q2	\$4,900	\$5,200	\$6,350		
Credential Rate	66%	69%	60%		
<b>WIOA DISLOCATED WORKER MEASURES</b>					
Employment Q2	84%	86%	85%		
Employment Q4	83%	85%	84%		
Median Earnings Q2	\$7,500	\$7,600	\$10,500		
Credential Rate	50%	55%	50%		
<b>WIOA YOUTH MEASURES</b>					
Employment/Education Q2	80%	80.5%	83%		
Employment/Education Q4	72%	73%	75%		
Median Earnings Q2					
Credential Rate	70%	70.5%	75%		

If requesting a goal other than the State or FY2016 projected goal, local areas must provide a justification with evidential data.

Submit by email to Lisa.J.Caissie@massmail.state.ma.us



# Appendix E

## Attachments

- Attachment A: Shared Customer Referral Form (from SSCC to Partners)
- Attachment B: Shared Customer Referral Form (from Partners to SSCC)
- Attachment C: Definition of a Shared Customer for the Region
- Attachment D: “*Pathway to Success*” Customer Flow Infographic (located in Appendix C)
- Attachment E: Data Correspondence from Data Committee





**Shared Customer Referral Form**

**South Shore Career Centers to a Partnering Organization**

Date: \_\_\_\_\_

Dear \_\_\_\_\_: (Participant Name)

Please be advised that you have been referred to the \_\_\_\_\_  
by the South Shore Career Centers.

**SSCC Organization Contact Information and Special Considerations:**

Name of Participant: \_\_\_\_\_

MOSES ID#: \_\_\_\_\_

SSCC Contact Name & Title: \_\_\_\_\_

Contact Phone#: \_\_\_\_\_ Contact Email: \_\_\_\_\_

Special Considerations: \_\_\_\_\_

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

**Confidentiality Waiver**

I hereby authorize \_\_\_\_\_ and the South Shore Career Centers  
to release and exchange information as necessary to facilitate my participation.

\_\_\_\_\_  
Participant Signature

\_\_\_\_\_  
Date

**Please bring this form to the Partnering Organization  
as confirmation of your referral**

**www.SSCareerCenters.org**





**Shared Customer Referral Form**

**Partnering Organization to the SSCC**

Date: \_\_\_\_\_

Dear \_\_\_\_\_: **(Participant Name)**

Please be advised that you have been referred to the South Shore Career Centers as an \_\_\_\_\_ Program Participant. The South Shore Career Centers provide a variety of career development and employment assistance services, and through this referral, you will have access to the many activities, programs and workshops available.

**South Shore Career Center locations:**

**Quincy:** 1515 Hancock Street, 1<sup>st</sup>. Floor, Quincy, MA 02169 (P: 617-745-4000).

**Plymouth:** 36 Cordage Park Circle, Suite 200, Plymouth, MA 02360 (P: 508-732-5300).

**Referring Partner Agency Contact Information and Special Considerations:**

Name of Participant: \_\_\_\_\_

Partner Contact Name & Title: \_\_\_\_\_

Contact Phone#: \_\_\_\_\_ Contact Email: \_\_\_\_\_

**If applicable:** Number of hours Participant is required per week at SSCC: \_\_\_\_\_

**Other Considerations:** \_\_\_\_\_

**Confidentiality Waiver**

I hereby authorize \_\_\_\_\_ and the South Shore Career Centers to release and exchange information as necessary to facilitate my participation.

\_\_\_\_\_  
Participant Signature

\_\_\_\_\_  
Date

**Please bring this form to the Career Center as confirmation of your referral.**

**www.SSCareerCenters.org**





## Shared Customer Definitions

### WIOA Shared Customer Definition:

Youth and job seekers that are eligible for and receive services from more than one WIOA Partner program are considered shared customers. Shared customers benefit from 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." (*Title-I Adult; Title-I Dislocated Worker; Title-I Youth; Adult Education & Literacy Act programs; Wagner Peyser employment services; Rehabilitation Act Title-I programs administered by DoED*)

A business that receives services from more than one WIOA Partner program is also considered a shared customer.

### SSWDB Co-Enrolled Shared Customer:

A Co-enrolled Shared Customer is an individual that is officially enrolled in the programs and services provided between two or more SSWDB Partnering Agencies. The eligibility requirements may differ between partnering agencies. However, the individual meets the eligibility requirements of each partnering agency and as such is enrolled in each agency.

**Example:** An enrolled Operation ABLE Customer is referred to the SSCC and becomes enrolled in the One-Stop MOSES System to utilize Career Center services, including Title-I Adult and Dislocated Worker Training funds.

### SSWDB Non-Enrolled Shared Customer:

A Non-enrolled Shared Customer is an individual that is referred to one or more partnering agencies, and the services/resources requested do not require eligibility determination and/or official enrollment.

**Example:** A Father Bill's MainSpring Customer is referred to the SSCC and utilizes basic services/workshops offered by the facility.

### SSWDB Business Shared Customer:

A Business Shared Customer is a company that receives services from more than one SSWDB Partnering organization / program.





South Shore Workforce Development Board  
15 Cottage Avenue, Suite 302 | Quincy, MA 02169

(617) 328-7001  
info@southshorewdb.org  
www.southshorewdb.org

March 7, 2018

Mr. David Manning  
Division of Career Services  
Planning and Workforce Integration, 1<sup>st</sup> floor  
19 Staniford Street  
Boston, MA 02114

Re: Data Collection and Sharing

Dear Dave:

This correspondence is in follow-up to your request for input on the data sharing challenges and opportunities the South Shore Workforce Development Board (SSWDB) has identified in collaboration with our Local MOU Partners.

In an effort to further refine the goals and objectives outlined in our Regions Local MOU Agreement adopted in June 2017, the SSWDB established two MOU Partner Sub-Committees:

- LMI Data and Training Committee
- Customer Flow & Referral Process Committee

Members of each committee have been working diligently to further define the many objectives and strategies identified in Phase 1 of our Local MOU Agreement.

The following is a brief summary of the more significant findings produced by the LMI Data and Training Committee in their efforts to enhance the collection and sharing of data among Local MOU Partners. The information enclosed was generated through the results of a Survey completed by our Local MOU Partners, and through discussions during the committee meetings. A total of sixteen (16) Local MOU Partners responded to the Survey, and although it is not an extremely large sample size, the results generated do identify common challenges in the need to establish effective and accurate data collection methods among multiple Partners.

### **General Note:**

**It is important to note that overall our Local MOU Partners strongly agree that it is imperative that the Division of Career Services (DCS) and the Executive Office of Labor and Workforce Development (EOLWD) formalize a data sharing agreement with the Department of Revenue.**



We fully recognize and appreciate the sensitive nature of sharing wage and employment information, however we are confident that policies and procedures can be established to facilitate the exchange of this data in a manner that will not compromise the personal information of an individual. **The depth of outcome measurements that will result from this enhanced data collection process with the Department of Revenue will be of great benefit to all that provide and receive services from the Workforce Development System in the Commonwealth.**

The following information hi-lights some of the data collection findings generated through the Survey and LMI Data and Training Committee meetings.

**Survey Question: What is your organizations policy for sharing data with other entities and organizations?**

Although specific policies naturally vary among Partner organizations, the general viewpoint is that a **Memorandum of Understanding and/or an Interagency Service Agreement** - along with a **Signed Release by the Client** should be in place before any information is shared. Data sharing does currently occur among some of the Partners through proprietary software programs and through the intake process.

One of the primary objectives of WIOA is to establish a more holistic approach when addressing the needs of Shared Customers. **In order to meet this objective our Local MOU Partners feel that there should be standard language provided by DCS/EOLWD to incorporate within the Local MOU Agreement that addresses data sharing.**

Our Local MOU Partners are in favor of sharing data to improve the manner in which Shared Customers are serviced in our region. The question is how do we make this happen? **Our region could establish a South Shore Region MOU / ISA among each Local MOU Partner, but would that be acceptable to the MOU Partners that have a state / federal authority to report and answer to?**

**It is further recommended that DCS / EOLWD establish a top-down approach to data sharing policies, procedures and agreements rather than a bottom-up approach. Our Local MOU Partners do not feel that each region should be required to create their own language and implement their own data sharing agreements – especially the Partners that have an active presence in multiple regions across the Commonwealth.**



**Survey Question: What are the “Proprietary” databases your organization currently utilizes to collect, store and report data?**

**Number of Responses to each database system noted below:**

SMARTT: 6      Cognos: 5      MOSES: 4      ACT: 3  
TORQ: 2      JobQuest: 2      UI Online: 2      SPARQ: 2  
Beacon: 1      MRCIS: 1      TrainingPro: 1      Promis: 2  
Octopi: 1      Power School: 1

It is clearly evident that there is quite a diversity of software databases utilized by our Local MOU Partners. **It is imperative that DCS and EOLWD continue their efforts to establish a Statewide system that can effectively collect, store and report on common data elements through one commonly accepted software system.**

**Survey Question: What format does your organization currently utilize to collect wage information?**

**Number of Responses to each wage collection method identified next to each option:**

Hourly Rate: 8      Weekly Rate: 4      Monthly Rate: 3      Annual Salary: 4

Assume Part Time is 20 hrs/wk or less: 6

Assume Full Time is 40 hrs/wk: 5

Assume Full Time is 35 hrs/wk: 4

Ask the number of hours worked during an average week/month/year: 3

Do not currently capture wage information: 4

Capture if wage includes health benefits: 2

Do not capture if wage includes health benefits: 2



It is clear that Local MOU Partners collect wage data differently – either based on personal preference / interest, or to satisfy the specific requirements of funders and grant providers. **It is the general consensus from our Local MOU Partners that a standard wage data collection template should be implemented among all MOU Partners.** For example if everyone agreed to collect wage data based on an Hourly Rate and/or Weekly Rate then the wage data reported as an aggregate would be more informative. The same is true in regards to what constitutes Full Time and Part Time, as well as standard Benefit Programs.

**Once again it is the viewpoint of our Local MOU Partners that these standards should be developed through a State level top-down agreement - not from the bottom up through each region on their own.**

**Survey Question: What type of “internal” databases do you utilize to collect, store and report data?**

Number of Responses to each database system noted below:

Excel: 3    Google Drive: 2    Apricot: 2    Member/Client Tracking: 2

Although the responses were limited it would appear that our Local Region could establish an Excel or Google Drive data sharing system that could be assessable and easily utilized by our Local MOU Partners until a Statewide system is established.

**Survey Question: Does your organization track/measure outreach and recruitment focused on underrepresented populations, including women and veterans?**

Responses noted below:

Yes: 10    No: 6

**The manner in which the information is collected and stored varies from local data drives to the utilization of software systems such as MOSES, SMART and SPARQ. This is important and valuable information to collect, and once again it would be beneficial to have a single Statewide data sharing and reporting system for this information.**



South Shore Workforce Development Board  
15 Cottage Avenue, Suite 302 | Quincy, MA 02169

(617) 328-7001  
info@southshorewdb.org  
www.southshorewdb.org

## Closing Comments:

It is clear, and of no surprise, that the collection, storing and reporting of data varies greatly among Local MOU Partners within the SSWDB region. It is also very likely that the South Shore Workforce Region is no different than the other fifteen Workforce Development Areas across the Commonwealth.

Although we fully appreciate the spirit in which DCS and EOLWD allow each region to develop local policies, priorities and procedures that make the most sense for their respective region – the SSWDB and our Local MOU Partners feel that this practice cannot be successfully applied when addressing the important and sensitive nature of the collection and reporting of wage and employment data.

**We strongly encourage DCS and EOLWD to continue efforts to establish a system/state data collection and sharing agreement that is accepted by all MOU Partners, and can be effectively implemented on a regional basis across the Commonwealth. The magnitude of the matter is far too costly and sensitive to ask each region to address individually.**

We further recognize that this is a very complicated and expensive process to undertake. However if successful, the results will prove to be powerful, effective and invaluable in our collective goal to have an accurate depiction of the successes and challenges associated with the Workforce Development System in our Region and throughout the Commonwealth.

Thank you for the opportunity to share this information with you and your Team. Please do not hesitate to contact me at (617) 934-4852 if you have any questions or need additional clarification.

Regards,

Dean Rizzo  
Executive Director