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Frank Edelblut  
Commissioner

Christine Brennan  
Deputy Commissioner

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STATE OF NEW HAMPSHIRE  
DEPARTMENT OF EDUCATION  
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Concord, N.H. 03301  
TEL. (603) 271-3495  
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February 14, 2023

His Excellency, Governor Christopher T. Sununu  
and the Honorable Executive Council  
State House  
Concord, New Hampshire 03301

**REQUESTED ACTION**

Authorize the Department of Education, Bureau of Vocational Rehabilitation of New Hampshire (VRNH) to enter a **sole source** contract with The University of Massachusetts Boston (UMB) Boston, MA (VC#177576), in an amount not to exceed \$282,783 to provide training to support Vocational Rehabilitation Counselors (VRC) engagement with VR participants from initial assessment to development of the Individualized Plan for Employment, effective upon Governor and Council approval through June 30, 2024. 100% Federal Funds.

Funds to support this request are available in FY2023 and are anticipated to be available in FY2024 in the account titled VR Field Programs-Federal, upon the availability and continued appropriation of funds in the future operating budget with the authority to adjust encumbrances amongst fiscal years within the price limitation through the Budget Office without further Governor and Council approval if needed and justified.

06-56-56-565010-25380000-102-500731	<u>FY2023</u>	<u>FY2024</u>	<u>Total</u>
Contracts for Program Services	\$80,603	\$202,180	\$282,783

**EXPLANATION**

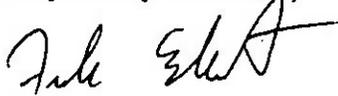
This request is **sole source** because a there was no response to a Request for Proposals (RFP) for VRC training that was posted on the NH Department of Education website on August 5, 2022. VRNH reached out to The University of Massachusetts Boston who showed interest and responded with a proposal that VRNH accepted as it was found to be adequate and aligned in what the agency is seeking.

University of Massachusetts Boston will develop and implement training to support engagement with VRNH participants from initial assessment to development of the Individualized Plan for Employment. The outcome of this work will allow the VR program staff to provide more efficient career guidance and employment goal definition. This training will support both the participant and their VR counselor in collaborating through informed choice goal setting. With a focus on considering attainable and realistic goals for competitive integrated employment to support participants in achieving their maximum employment potential. VRNH has experienced a decline in individuals completing the process from application to job attainment in recent years. This is partly due to the agency having many newly hired counselors that have little experience in the direct field of Vocational Rehabilitation. This training will support these counselors towards not only timely plan development but quality plan development to ensure individuals receive great customer service with accurate job attainment services. This will also ensure that career resources are provided in a standardized systematic format with the goal of developing individualized plan for employment quicker, implementing services timely and getting more people with disabilities participating in the workforce.

These trainings will include nine (9) virtual interactive sessions, nine (9) community of practice sessions and three (3) learning collaboratives which are 2 days in person sessions consisting of VRNH staff. Included will be the training curricula, trainee guide and all material such as handouts and vignettes as appropriate. Web-based training modules specific to career exploration tools, strategies to enhance career decision making process with specific disability groups, informed choice, development of Individualized Plan for Employment, person-centered planning, and VRNH services will also be included. Training will include pre and post-test to assess competency.

The University of Massachusetts Boston has specific expertise in working with VRNH agencies to accomplish a host of training, services, technical assistance, implementation of the comprehensive statewide needs assessment to improve program effectiveness for individuals served by the bureau. The technical assistance staff at the university have the following expertise: Disability and inclusion research and evaluation, training and technical assistance/consultation, employment, education, policy analysis, pre-service training, and service delivery.

Respectfully Submitted,



Frank Edelblut  
Commissioner of Education

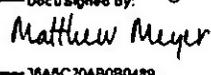
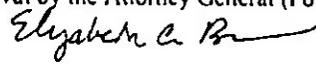
**Notice:** This agreement and all of its attachments shall become public upon submission to Governor and Executive Council for approval. Any information that is private, confidential or proprietary must be clearly identified to the agency and agreed to in writing prior to signing the contract.

**AGREEMENT**

The State of New Hampshire and the Contractor hereby mutually agree as follows:

**GENERAL PROVISIONS**

**I. IDENTIFICATION.**

1.1 State Agency Name Department of Education		1.2 State Agency Address 25 Hall St. Concord, NH 03301	
1.3 Contractor Name University of Massachusetts Boston		1.4 Contractor Address 100 Morrissey Boulevard Boston, MA 02125	
1.5 Contractor Phone Number 617-297-6412	1.6 Account Number See Exhibit C	1.7 Completion Date 6/30/2024	1.8 Price Limitation \$282,783
1.9 Contracting Officer for State Agency Lisa Ilinson-Hatz		1.10 State Agency Telephone Number 603-419-0086	
1.11 Contractor Signature  Date: 2/3/2023		1.11 Name and Title of Contractor Signatory Matthew Meyer, Associate Vice Provost for Research & Director of ORSP	
1.13 State Agency Signature  Date: 2/21/2023		1.14 Name and Title of State Agency Signatory Frank Edelblut, Commissioner	
1.15 Approval by the N.H. Department of Administration, Division of Personnel (if applicable)  By: _____ Director, On: _____			
1.16 Approval by the Attorney General (Form, Substance and Execution) (if applicable)  By:  On: 2/21/2023 Elizabeth A. Brown			
1.17 Approval by the Governor and Executive Council (if applicable)  G&C Item number: _____ G&C Meeting Date: _____			

**2. SERVICES TO BE PERFORMED.** The State of New Hampshire, acting through the agency identified in block 1.1 ("State"), engages contractor identified in block 1.3 ("Contractor") to perform, and the Contractor shall perform, the work or sale of goods, or both, identified and more particularly described in the attached EXHIBIT B which is incorporated herein by reference ("Services").

**3. EFFECTIVE DATE/COMPLETION OF SERVICES.**

3.1 Notwithstanding any provision of this Agreement to the contrary, and subject to the approval of the Governor and Executive Council of the State of New Hampshire, if applicable, this Agreement, and all obligations of the parties hereunder, shall become effective on the date the Governor and Executive Council approve this Agreement as indicated in block 1.17, unless no such approval is required, in which case the Agreement shall become effective on the date the Agreement is signed by the State Agency as shown in block 1.13 ("Effective Date").

3.2 If the Contractor commences the Services prior to the Effective Date, all Services performed by the Contractor prior to the Effective Date shall be performed at the sole risk of the Contractor, and in the event that this Agreement does not become effective, the State shall have no liability to the Contractor, including without limitation, any obligation to pay the Contractor for any costs incurred or Services performed. Contractor must complete all Services by the Completion Date specified in block 1.7.

**4. CONDITIONAL NATURE OF AGREEMENT.**

Notwithstanding any provision of this Agreement to the contrary, all obligations of the State hereunder, including, without limitation, the continuance of payments hereunder, are contingent upon the availability and continued appropriation of funds affected by any state or federal legislative or executive action that reduces, eliminates or otherwise modifies the appropriation or availability of funding for this Agreement and the Scope for Services provided in EXHIBIT B, in whole or in part. In no event shall the State be liable for any payments hereunder in excess of such available appropriated funds. In the event of a reduction or termination of appropriated funds, the State shall have the right to withhold payment until such funds become available, if ever, and shall have the right to reduce or terminate the Services under this Agreement immediately upon giving the Contractor notice of such reduction or termination. The State shall not be required to transfer funds from any other account or source to the Account identified in block 1.6 in the event funds in that Account are reduced or unavailable.

**5. CONTRACT PRICE/PRICE LIMITATION/ PAYMENT.**

5.1 The contract price, method of payment, and terms of payment are identified and more particularly described in EXHIBIT C which is incorporated herein by reference.

5.2 The payment by the State of the contract price shall be the only and the complete reimbursement to the Contractor for all expenses, of whatever nature incurred by the Contractor in the performance hereof, and shall be the only and the complete

compensation to the Contractor for the Services. The State shall have no liability to the Contractor other than the contract price.

5.3 The State reserves the right to offset from any amounts otherwise payable to the Contractor under this Agreement those liquidated amounts required or permitted by N.H. RSA 80:7 through RSA 80:7-c or any other provision of law.

5.4 Notwithstanding any provision in this Agreement to the contrary, and notwithstanding unexpected circumstances, in no event shall the total of all payments authorized, or actually made hereunder, exceed the Price Limitation set forth in block 1.8.

**6. COMPLIANCE BY CONTRACTOR WITH LAWS AND REGULATIONS/ EQUAL EMPLOYMENT OPPORTUNITY.**

6.1 In connection with the performance of the Services, the Contractor shall comply with all applicable statutes, laws, regulations, and orders of federal, state, county or municipal authorities which impose any obligation or duty upon the Contractor, including, but not limited to, civil rights and equal employment opportunity laws. In addition, if this Agreement is funded in any part by monies of the United States, the Contractor shall comply with all federal executive orders, rules, regulations and statutes, and with any rules, regulations and guidelines as the State or the United States issue to implement these regulations. The Contractor shall also comply with all applicable intellectual property laws.

6.2 During the term of this Agreement, the Contractor shall not discriminate against employees or applicants for employment because of race, color, religion, creed, age, sex, handicap, sexual orientation, or national origin and will take affirmative action to prevent such discrimination.

6.3. The Contractor agrees to permit the State or United States access to any of the Contractor's books, records and accounts for the purpose of ascertaining compliance with all rules, regulations and orders, and the covenants, terms and conditions of this Agreement.

**7. PERSONNEL.**

7.1 The Contractor shall at its own expense provide all personnel necessary to perform the Services. The Contractor warrants that all personnel engaged in the Services shall be qualified to perform the Services, and shall be properly licensed and otherwise authorized to do so under all applicable laws.

7.2 Unless otherwise authorized in writing, during the term of this Agreement, and for a period of six (6) months after the Completion Date in block 1.7, the Contractor shall not hire, and shall not permit any subcontractor or other person, firm or corporation with whom it is engaged in a combined effort to perform the Services to hire, any person who is a State employee or official, who is materially involved in the procurement, administration or performance of this Agreement. This provision shall survive termination of this Agreement.

7.3 The Contracting Officer specified in block 1.9, or his or her successor, shall be the State's representative. In the event of any dispute concerning the interpretation of this Agreement, the Contracting Officer's decision shall be final for the State.

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**8. EVENT OF DEFAULT/REMEDIES.**

8.1 Any one or more of the following acts or omissions of the Contractor shall constitute an event of default hereunder ("Event of Default"):

8.1.1 failure to perform the Services satisfactorily or on schedule;

8.1.2 failure to submit any report required hereunder; and/or

8.1.3 failure to perform any other covenant, term or condition of this Agreement.

8.2 Upon the occurrence of any Event of Default, the State may take any one, or more, or all, of the following actions:

8.2.1 give the Contractor a written notice specifying the Event of Default and requiring it to be remedied within, in the absence of a greater or lesser specification of time, thirty (30) days from the date of the notice; and if the Event of Default is not timely cured, terminate this Agreement, effective two (2) days after giving the Contractor notice of termination;

8.2.2 give the Contractor a written notice specifying the Event of Default and suspending all payments to be made under this Agreement and ordering that the portion of the contract price which would otherwise accrue to the Contractor during the period from the date of such notice until such time as the State determines that the Contractor has cured the Event of Default shall never be paid to the Contractor;

8.2.3 give the Contractor a written notice specifying the Event of Default and set off against any other obligations the State may owe to the Contractor any damages the State suffers by reason of any Event of Default; and/or

8.2.4 give the Contractor a written notice specifying the Event of Default, treat the Agreement as breached, terminate the Agreement and pursue any of its remedies at law or in equity, or both.

8.3. No failure by the State to enforce any provisions hereof after any Event of Default shall be deemed a waiver of its rights with regard to that Event of Default, or any subsequent Event of Default. No express failure to enforce any Event of Default shall be deemed a waiver of the right of the State to enforce each and all of the provisions hereof upon any further or other Event of Default on the part of the Contractor.

**9. TERMINATION.**

9.1 Notwithstanding paragraph 8, the State may, at its sole discretion, terminate the Agreement for any reason, in whole or in part, by thirty (30) days written notice to the Contractor that the State is exercising its option to terminate the Agreement.

9.2 In the event of an early termination of this Agreement for any reason other than the completion of the Services, the Contractor shall, at the State's discretion, deliver to the Contracting Officer, not later than fifteen (15) days after the date of termination, a report ("Termination Report") describing in detail all Services performed, and the contract price earned, to and including the date of termination. The form, subject matter, content, and number of copies of the Termination Report shall be identical to those of any Final Report described in the attached EXHIBIT B. In addition, at the State's discretion, the Contractor shall, within 15 days of notice of early termination, develop and

submit to the State a Transition Plan for services under the Agreement.

**10. DATA/ACCESS/CONFIDENTIALITY/PRESERVATION.**

10.1 As used in this Agreement, the word "data" shall mean all information and things developed or obtained during the performance of, or acquired or developed by reason of, this Agreement, including, but not limited to, all studies, reports, files, formulae, surveys, maps, charts, sound recordings, video recordings, pictorial reproductions, drawings, analyses, graphic representations, computer programs, computer printouts, notes, letters, memoranda, papers, and documents, all whether finished or unfinished.

10.2 All data and any property which has been received from the State or purchased with funds provided for that purpose under this Agreement, shall be the property of the State, and shall be returned to the State upon demand or upon termination of this Agreement for any reason.

10.3 Confidentiality of data shall be governed by N.H. RSA chapter 91-A or other existing law. Disclosure of data requires prior written approval of the State.

**11. CONTRACTOR'S RELATION TO THE STATE.** In the performance of this Agreement the Contractor is in all respects an independent contractor, and is neither an agent nor an employee of the State. Neither the Contractor nor any of its officers, employees, agents or members shall have authority to bind the State or receive any benefits, workers' compensation or other emoluments provided by the State to its employees.

**12. ASSIGNMENT/DELEGATION/SUBCONTRACTS.**

12.1 The Contractor shall not assign, or otherwise transfer any interest in this Agreement without the prior written notice, which shall be provided to the State at least fifteen (15) days prior to the assignment, and a written consent of the State. For purposes of this paragraph, a Change of Control shall constitute assignment. "Change of Control" means (a) merger, consolidation, or a transaction or series of related transactions in which a third party, together with its affiliates, becomes the direct or indirect owner of fifty percent (50%) or more of the voting shares or similar equity interests, or combined voting power of the Contractor, or (b) the sale of all or substantially all of the assets of the Contractor.

12.2 None of the Services shall be subcontracted by the Contractor without prior written notice and consent of the State. The State is entitled to copies of all subcontracts and assignment agreements and shall not be bound by any provisions contained in a subcontract or an assignment agreement to which it is not a party.

**13. INDEMNIFICATION.** Unless otherwise exempted by law, the Contractor shall indemnify and hold harmless the State, its officers and employees, from and against any and all claims, liabilities and costs for any personal injury or property damages, patent or copyright infringement, or other claims asserted against the State, its officers or employees, which arise out of (or which may be claimed to arise out of) the acts or omissions of the

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Contractor, or subcontractors, including but not limited to the negligence, reckless or intentional conduct. The State shall not be liable for any costs incurred by the Contractor arising under this paragraph 13. Notwithstanding the foregoing, nothing herein contained shall be deemed to constitute a waiver of the sovereign immunity of the State, which immunity is hereby reserved to the State. This covenant in paragraph 13 shall survive the termination of this Agreement.

#### 14. INSURANCE.

14.1 The Contractor shall, at its sole expense, obtain and continuously maintain in force, and shall require any subcontractor or assignee to obtain and maintain in force, the following insurance:

14.1.1 commercial general liability insurance against all claims of bodily injury, death or property damage, in amounts of not less than \$1,000,000 per occurrence and \$2,000,000 aggregate or excess; and

14.1.2 special cause of loss coverage form covering all property subject to subparagraph 10.2 herein, in an amount not less than 80% of the whole replacement value of the property.

14.2 The policies described in subparagraph 14.1 herein shall be on policy forms and endorsements approved for use in the State of New Hampshire by the N.H. Department of Insurance, and issued by insurers licensed in the State of New Hampshire.

14.3 The Contractor shall furnish to the Contracting Officer identified in block 1.9, or his or her successor, a certificate(s) of insurance for all insurance required under this Agreement. Contractor shall also furnish to the Contracting Officer identified in block 1.9, or his or her successor, certificate(s) of insurance for all renewal(s) of insurance required under this Agreement no later than ten (10) days prior to the expiration date of each insurance policy. The certificate(s) of insurance and any renewals thereof shall be attached and are incorporated herein by reference.

#### 15. WORKERS' COMPENSATION.

15.1 By signing this agreement, the Contractor agrees, certifies and warrants that the Contractor is in compliance with or exempt from, the requirements of N.H. RSA chapter 281-A (*"Workers' Compensation"*).

15.2 To the extent the Contractor is subject to the requirements of N.H. RSA chapter 281-A, Contractor shall maintain, and require any subcontractor or assignee to secure and maintain, payment of Workers' Compensation in connection with activities which the person proposes to undertake pursuant to this Agreement. The Contractor shall furnish the Contracting Officer identified in block 1.9, or his or her successor, proof of Workers' Compensation in the manner described in N.H. RSA chapter 281-A and any applicable renewal(s) thereof, which shall be attached and are incorporated herein by reference. The State shall not be responsible for payment of any Workers' Compensation premiums or for any other claim or benefit for Contractor, or any subcontractor or employee of Contractor, which might arise under applicable State of New Hampshire Workers' Compensation laws in connection with the performance of the Services under this Agreement.

16. **NOTICE.** Any notice by a party hereto to the other party shall be deemed to have been duly delivered or given at the time of mailing by certified mail, postage prepaid, in a United States Post Office addressed to the parties at the addresses given in blocks 1.2 and 1.4, herein.

17. **AMENDMENT.** This Agreement may be amended, waived or discharged only by an instrument in writing signed by the parties hereto and only after approval of such amendment, waiver or discharge by the Governor and Executive Council of the State of New Hampshire unless no such approval is required under the circumstances pursuant to State law, rule or policy.

18. **CHOICE OF LAW AND FORUM.** This Agreement shall be governed, interpreted and construed in accordance with the laws of the State of New Hampshire, and is binding upon and inures to the benefit of the parties and their respective successors and assigns. The wording used in this Agreement is the wording chosen by the parties to express their mutual intent, and no rule of construction shall be applied against or in favor of any party. Any actions arising out of this Agreement shall be brought and maintained in New Hampshire Superior Court which shall have exclusive jurisdiction thereof.

19. **CONFLICTING TERMS.** In the event of a conflict between the terms of this P-37 form (as modified in EXHIBIT A) and/or attachments and amendment thereof, the terms of the P-37 (as modified in EXHIBIT A) shall control.

20. **THIRD PARTIES.** The parties hereto do not intend to benefit any third parties and this Agreement shall not be construed to confer any such benefit.

21. **HEADINGS.** The headings throughout the Agreement are for reference purposes only, and the words contained therein shall in no way be held to explain, modify, amplify or aid in the interpretation, construction or meaning of the provisions of this Agreement.

22. **SPECIAL PROVISIONS.** Additional or modifying provisions set forth in the attached EXHIBIT A are incorporated herein by reference.

23. **SEVERABILITY.** In the event any of the provisions of this Agreement are held by a court of competent jurisdiction to be contrary to any state or federal law, the remaining provisions of this Agreement will remain in full force and effect.

24. **ENTIRE AGREEMENT.** This Agreement, which may be executed in a number of counterparts, each of which shall be deemed an original, constitutes the entire agreement and understanding between the parties, and supersedes all prior agreements and understandings with respect to the subject matter hereof.

**EXHIBIT A**  
**SPECIAL PROVISIONS**

Additional Exhibits D-G.

**Federal Certification 2 CFR 200.415**

Required certifications include: (a) To assure that expenditures are proper and in accordance with the terms and conditions of the Federal award and approved project budgets, the annual and final fiscal reports or vouchers requesting payment under the agreements must include a certification, signed by an official who is authorized to legally bind the non-Federal entity, which reads as follows:

By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729–3730 and 3801–3812).

All the terms and conditions applicable for the use of federal funds, as outlined in the Office of Management and Budget (OMB) Uniform Grant Guidance, shall be applied by the contractor to any contract activities and expenses, and may be amended from time to time.

**Workers' Compensation**

The University of Massachusetts (UMass) Boston is self-insured per MA law for worker's compensation. A copy of the letter from General Counsel's Office outlining the MA law that self-insures UMass for worker's compensation is provided as Attachment B. The University of Massachusetts (UMass) Boston is self-insured for \$250,000 and carries a liability policy limit of \$750,000, which totals the \$1 million occurrence limit required by the State of NH.

## EXHIBIT B

### SCOPE OF SERVICES

University of Massachusetts Boston (UMB) will provide the following services to the New Hampshire Department of Education, Bureau of Vocational Rehabilitation (VRNH), effective upon Governor and Council approval through June 30, 2024:

Enter a contract with the Bureau of Vocational Rehabilitation (VRNH) to implement and deliver a customized training series to assist vocational rehabilitation staff complete a Comprehensive Assessments (CA) and develop Individualized Plans for Employment (IPE) with individuals with disabilities (participants) in accordance with federal regulation and bureau policy. Related federal regulation includes 34 CFR 361 and 363.

The contractor, University of Massachusetts Boston, will:

1. Facilitate a kickoff meeting between UMB and VRNH's Training Unit to discuss and plan contract deliverables to include a project management plan outlining timeframes of services to be delivered, timing and location of trainings.
2. Facilitate monthly training event(s) delivered both in-person and virtually.
  - a. Nine (9) virtual interactive training sessions, on the UMB system, available for use with the initial and subsequent training groups through the end date of the contract.
  - b. Nine (9) Community of Practice (CoP) sessions, one shortly following each virtual interactive training session on the UMB system providing one-on-one discussion and concept application. The CoP's will be recorded and made available to VRNH as a resource in the VRNH shared computer drive.
  - c. Three (3) Learning Collaboratives, all in person with the training cohort consisting of VRNH staff. These will be 2-day in-person sessions of more detailed and intensive work to understand processes and synthesize training information and concepts.
3. Provide Training Curricula that contains an agenda, lesson plans, PowerPoint, competencies to be learned and provides references to the Trainee Guide. The Training Curricula will be provided to VRNH for continuous training for new and seasoned staff.
4. The Trainee Guide will serve as a course catalog to accompany the Training Curricula. The Trainee Guide will include an agenda and schedule, training expectations (i.e., participation expectations, competencies, and skill acquisition), lesson plans and objectives for all nine lessons and supplemental material such as handouts, relevant research, tools, and homework assignments.
5. Provide supplemental handouts, materials, and vignettes as appropriate. These will include experiential components as part of the training. Supplemental material to the online modules will be available to be downloaded directly from UMB's Canvas system. This will include sample

## EXHIBIT B CONTINUED

tools, briefs, and other handouts. Experiential components will be embedded in the lessons themselves. UMB uses several platforms to create interactive components that are uploaded to

UMB's Canvas system. This includes using case scenarios, videos, knowledge check activities like polls or matching activities and a discussion board.

Supplemental material may also be used for the CoP and learning collaborative sessions. Written materials may include handouts and other supporting documentation. In addition, the training team will employ several interactive strategies including small group activities, poster sessions, and case presentations/discussions.

6. Provide web-based training modules specific to career exploration tools, strategies to enhance career decision making process with specific disability groups, informed choice, development of Individualized Plan for Employment, person-centered planning, and VRNH services. Training will include pre and post-test to assess competency. UMB will use a multi-modal training approach which includes an asynchronous online component. This portion of the training focuses on comprehensive assessment/career exploration and Labor Market Information (LMI) tools. In addition to familiarizing participants with each tool, the training will provide guidance on when, who and how to use them as well as using the findings and analysis to inform the vocational counseling.

**EXHIBIT C**  
**METHOD OF PAYMENT**

	FY23	FY24	Total
Salaries	\$41,804	\$125,413	\$167,217
Fringe Benefits	\$16,047	\$48,144	\$64,191
Travel	\$5,370	\$10,730	\$16,100
Supplies & Material	\$3,405	\$1,199	\$4,604
Contractuals (interpreters, closed/video captioning) costs with development and presentation of the training curriculum	\$7,322	\$0	\$7,322
Indirect Costs (9.00%)	\$6,655	\$16,694	\$23,349
<b>Total</b>	<b>\$80,603</b>	<b>\$202,180</b>	<b>\$282,783</b>

**Limitation on Price:** Upon mutual agreement between the state contracting officer and the contractor, line items in this budget may be adjusted one to another, but in no case shall the total budget exceed the price limitation of \$282,783.

**Funding Source:** Funds to support this request are available in FY2023 and anticipated to be available in FY2024 in the account titled VR Field Programs-Federal, upon the availability and continued appropriation of funds in the future operating budget with the authority to adjust encumbrances amongst fiscal years within the price limitation through the Budget Office without further Governor and Council approval if needed and justified.

06-56-56-565010-25380000-102-500731	<u>FY23</u>	<u>FY24</u>	<u>Total</u>
Contracts for Program Services	\$80,603	\$202,180	\$282,783

**Method of Payment:** Payment will be made upon the submittal of monthly invoices that are received by the 10th day of the following month and is supported by a summary of activities/completed deliverables that have taken place in accordance with the terms of the contract, along with a detailed listing of expenses incurred. If otherwise correct and acceptable, payment will be made for 100% of the expenditures listed. A final invoice is due within 30 days of the end of this contract. Invoices and receipts shall be submitted electronically to:

Bill Gaffney  
[William.G.Gaffney@doe.nh.gov](mailto:William.G.Gaffney@doe.nh.gov)  
 Cc: [Susan.S.Roma@doe.nh.gov](mailto:Susan.S.Roma@doe.nh.gov)  
 Vocational Rehabilitation  
 NH Department of Education  
 21 S. Fruit Street, Suite 20  
 Concord, NH 03301

## EXHIBIT D

### Contractor Obligations

Contracts in excess of the simplified acquisition threshold (currently set at \$250,000) must address **administrative, contractual, or legal remedies** in instances where the contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate. Reference: 2 C.F.R. § 200.326 and 2 C.F.R. 200, Appendix II, required contract clauses.

The contractor acknowledges that 31 U.S.C. Chap. 38 (Administrative Remedies for False Claims and Statements) applies to the contractor's actions pertaining to this contract.

The Contractor, certifies and affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. § 3801 et seq., apply to this certification and disclosure, if any.

#### Breach

A breach of the contract clauses above may be grounds for termination of the contract, and for debarment as a contractor and subcontractor as provided in 29 C.F.R. § 5.12.

#### Fraud and False Statements

The Contractor understands that, if the project which is the subject of this Contract is financed in whole or in part by federal funds, that if the undersigned, the company that the Contractor represents, or any employee or agent thereof, knowingly makes any false statement, representation, report or claim as to the character, quality, quantity, or cost of material used or to be used, or quantity or quality work performed or to be performed, or makes any false statement or representation of a material fact in any statement, certificate, or report, the Contractor and any company that the Contractor represents may be subject to prosecution under the provision of 18 USC §1001 and §1020.

#### Environmental Protection

(This clause is applicable if this Contract exceeds \$150,000. It applies to Federal-aid contracts only.)

The Contractor is required to comply with all applicable standards, orders or requirements issued under Section 306 of the Clean Air Act (42 U.S.C. 1857 (h)), Section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency (EPA) regulations (40 CFR Part 15) which prohibit the use under non-exempt Federal contracts, grants or loans of facilities included on the EPA List of Violating Facilities. Violations shall be reported to the FHWA and to the U.S. EPA Assistant Administrator for Enforcement.

#### Procurement of Recovered Materials

In accordance with Section 6002 of the Solid Waste Disposal Act (42 U.S.C. § 6962), State agencies and agencies of a political subdivision of a state that are using appropriated Federal funds for procurement must procure items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired in the preceding fiscal year exceeded \$10,000; must procure solid waste management services in a manner that maximizes energy and resource recovery; and must have established an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

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Contractor Initials \_\_\_\_\_  
Date 2/3/2023

**Exhibit E**

**Federal Debarment and Suspension**

- a. By signature on this Contract, the Contractor certifies its compliance, and the compliance of its Sub-Contractors, present or future, by stating that any person associated therewith in the capacity of owner, partner, director, officer, principal investor, project director, manager, auditor, or any position of authority involving federal funds:
1. Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any Federal Agency;
  2. Does not have a proposed debarment pending;
  3. Has not been suspended, debarred, voluntarily excluded or determined ineligible by any Federal Agency within the past three (3) years; and
  4. Has not been indicted, convicted, or had a civil judgment rendered against the firm by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past three (3) years.
- b. Where the Contractor or its Sub-Contractor is unable to certify to the statement in Section a.1. above, the Contractor or its Sub-Contractor shall be declared ineligible to enter into Contract or participate in the project.
- c. Where the Contractor or Sub-Contractor is unable to certify to any of the statements as listed in Sections a.2., a.3., or a.4., above, the Contractor or its Sub-Contractor shall submit a written explanation to the DOE. The certification or explanation shall be considered in connection with the DOE's determination whether to enter into Contract.
- d. The Contractor shall provide immediate written notice to the DOE if, at any time, the Contractor or its Sub-Contractor, learn that its Debarment and Suspension certification has become erroneous by reason of changed circumstances.

Contractor Initials   
Date 2/3/2023

**Exhibit F**

**Anti-Lobbying**

The Contractor agrees to comply with the provisions of Section 319 of Public Law 101-121, Government wide Guidance for New Restrictions on Lobbying, and 31 U.S.C. 1352, and further agrees to have the Contractor's representative, execute the following Certification:

The Contractor certifies, by signing and submitting this contract, to the best of his/her knowledge and belief, that:

- a. No federal appropriated funds have been paid or shall be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence any officer or employee of any State or Federal Agency, a Member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any Federal contract, the making of any federal grant, the making of any federal loan, the entering into any cooperative agreement, and the extension, continuation, renewal amendment, or modification of any Federal contract grant, loan, or cooperative agreement.
- b. If any funds other than federally appropriated funds have been paid or shall be paid to any person for influencing or attempting to influence an officer or employee of any Federal Agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit the "Disclosure of Lobbying Activities" form in accordance with its instructions (<http://www.whitehouse.gov/omb/grants/sfillin.pdf>).
- c. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making and entering into this transaction imposed by Section 1352, Title 31 and U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.
- d. The Contractor also agrees, by signing this contract that it shall require that the language of this certification be included in subcontracts with all Sub-Contractor(s) and lower-tier Sub-Contractors which exceed \$100,000 and that all such Sub-Contractors and lower-tier Sub-Contractors shall certify and disclose accordingly.
- e. The DOE shall keep the firm's certification on file as part of its original contract. The Contractor shall keep individual certifications from all Sub-Contractors and lower-tier Sub-Contractors on file. Certification shall be retained for three (3) years following completion and acceptance of any given project.

  
Contractor Initials  
Date 2/3/2023

## Exhibit G

### Rights to Inventions Made Under a Contract, Copy Rights and Confidentiality

#### Rights to Inventions Made Under a Contract or Agreement

Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the DOE.

Any discovery or invention that arises during the course of the contract shall be reported to the DOE. The Contractor is required to disclose inventions promptly to the contracting officer (within 2 months) after the inventor discloses it in writing to contractor personnel responsible for patent matters. The awarding agency shall determine how rights in the invention/discovery shall be allocated consistent with "Government Patent Policy" and Title 37 C.F.R. § 401.

#### Confidentiality

All Written and oral information and materials disclosed or provided by the DOE under this agreement constitutes Confidential Information, regardless of whether such information was provided before or after the date on this agreement or how it was provided.

The Contractor and representatives thereof, acknowledge that by making use of, acquiring or adding to information about matters and data related to this agreement, which are confidential to the DOE and its partners, must remain the exclusive property of the DOE.

Confidential information means all data and information related to the business and operation of the DOE, including but not limited to all school and student data contained in NH Title XV, Education, Chapters 186-200.

Confidential information includes but is not limited to, student and school district data, revenue and cost information, the source code for computer software and hardware products owned in part or in whole by the DOE, financial information, partner information (including the identity of DOE partners), Contractor and supplier information, (including the identity of DOE Contractors and suppliers), and any information that has been marked "confidential" or "proprietary", or with the like designation. During the term of this contract the Contractor agrees to abide by such rules as may be adopted from time to time by the DOE to maintain the security of all confidential information. The Contractor further agrees that it will always regard and preserve as confidential information/data received during the performance of this contract. The Contractor will not use, copy, make notes, or use excerpts of any confidential information, nor will it give, disclose, provide access to, or otherwise make available any confidential information to any person not employed or contracted by the DOE or subcontracted with the Contractor.

#### Ownership of Intellectual Property

The DOE shall retain ownership of all source data and other intellectual property of the DOE provided to the Contractor in order to complete the services of this agreement. As well the DOE will retain copyright ownership for any and all materials, patents and intellectual property produced, including, but not limited to, brochures, resource directories, protocols, guidelines, posters, or reports. The Contractor shall not reproduce any materials for purposes other than use for the terms under the contract without prior written approval from the DOE.

DS  
MM

Contractor Initials  
Date 2/3/2023

# State of New Hampshire

## Department of State

### CERTIFICATE

I, David M. Scanlan, Secretary of State of the State of New Hampshire, do hereby certify that UNIVERSITY OF MASSACHUSETTS BOSTON is a Massachusetts Nonprofit Corporation registered to transact business in New Hampshire on March 03, 2020. I further certify that all fees and documents required by the Secretary of State's office have been received and is in good standing as far as this office is concerned.

Business ID: 837883

Certificate Number: 0005902827



IN TESTIMONY WHEREOF,  
I hereto set my hand and cause to be affixed  
the Seal of the State of New Hampshire,  
this 1st day of December A.D. 2022.

A handwritten signature in black ink, appearing to read "D. Scanlan", is written over a faint circular stamp.

David M. Scanlan  
Secretary of State

Certificate of Attestation

I hereby certify that said Certificate of Authority, dated as of 2/3/2023, (attached hereto) has not been amended or repealed and remains in full force and effect as of the date of the contract to which this certificate is attached. This authority remains valid for thirty (30) days. I further certify that it is understood that the State of New Hampshire will rely on this certificate as evidence that the person(s) listed above currently occupy the position(s) indicated and that they have full authority to bind the corporation.

DocuSigned by:  
  
250A874F71C141B...

Shala Bonyun  
Associate Director ORSP  
University of Massachusetts Boston

2/3/2023  
Date

**EXTRACT FROM THE RECORDS OF  
UNIVERSITY OF MASSACHUSETTS**

**Granting Authority to Execute Contracts and All Other Instruments**

**I, Zunilka Barrett, Secretary of the Board of Trustees of the University of Massachusetts**, do hereby certify that the following is a true and complete copy of a vote duly adopted by the Board of Trustees of the University of Massachusetts at a meeting duly called and held on the fifth day of February, nineteen hundred and ninety-seven at the University of Massachusetts, Chancellor's Conference Room, Boston, Massachusetts:

“Further, to affirm that, except as to matters governed by the University of Massachusetts Intellectual Property Policy (Doc. T96-040), the Treasurer of the University of Massachusetts or his designee shall be the sole contracting officer of the University with the Authority to execute all contract, grants, restricted gifts (excluding endowments), and amendments thereto for sponsored programs in instruction, research, or public service, unless and until otherwise voted by the Board of Trustees.”

I further certify that the Senior Vice President for Administration & Finance and Treasurer of the University, Lisa A. Calise, has retained the right to remain the sole contracting officer of the University of Massachusetts, but in her absence, she has designated Andrew W. Russell, Senior Assistant Vice President of Operations and Associate Treasurer.

I further certify that effective March 31, 2021, the following is a list of designated individuals authorized in accordance with the afore referenced votes to review and execute all grants and contracts for sponsored programs in instruction, research and public service that are applicable to and received on behalf of the University of Massachusetts for their respective campuses.

**Amherst Campus**

**Kumble R. Subbaswamy**, Chancellor, Amherst Campus, Amherst, Massachusetts,  
**Michael F. Malone**, Vice Chancellor, Research and Engagement Amherst Campus, Amherst, Massachusetts,  
**Carol P. Sprague**, Director, Office of Post Award Management, Amherst Campus, Amherst, Massachusetts,  
**Jennifer A. Donais**, Assistant Vice Chancellor, Research and Engagement and Director of Research Compliance, Amherst Campus, Amherst, Massachusetts,  
**Marcia Day**, Director, Office of Pre-Award Services, Amherst Campus, Amherst, Massachusetts  
**Laura J. Howard**, Associate Director, Division of Continuing Education, Amherst Campus, Amherst, Massachusetts  
**Steven D. Goodwin**, Deputy Chancellor, Amherst Campus, Amherst, Massachusetts

**Boston Campus**

**Marcelo Suárez-Orozco**, Chancellor, Boston Campus, Boston, Massachusetts,  
**Kathleen Kirleis**, Vice Chancellor for Administration and Finance, Boston Campus, Boston, Massachusetts,  
**Joseph Berger**, Provost & Vice Chancellor for Academic Affairs, Boston Campus, Boston, Massachusetts,  
**Bala Sundaram**, Vice Provost for Research and Strategic Initiatives and Dean of Graduate Studies, Boston Campus, Boston, Massachusetts,

**Matthew L. Meyer**, Associate Vice Provost for Research and Director of the Office of Research & Sponsored Programs, Boston Campus, Boston, Massachusetts,

**Shala A. Bonyun**, Assistant Director for the Office of Research and Sponsored Programs, Boston Campus, Boston, Massachusetts,

### **Dartmouth Campus**

**Mark Fuller** Interim Chancellor, Dartmouth Campus, Dartmouth, Massachusetts,

**Michael Goodman**, Acting Provost & Vice Chancellor for Academic Affairs, Dartmouth Campus, Dartmouth, Massachusetts,

**Michelle M. Plaud**, Manager of Pre and Post Award Administration, Dartmouth Campus, Dartmouth, Massachusetts,

**Deborah Dolan**, Pre-Award and Subrecipient Manager, Dartmouth Campus, Dartmouth Massachusetts,

**Megan Hennessey-Greene**, Director, Office of Research Administration, Dartmouth Campus, Dartmouth Massachusetts,

**Ramprasad Balasubramanian**, Vice Provost for Research and Academic Affairs, Dartmouth Campus, Dartmouth, Massachusetts,

### **Lowell Campus**

**Jacqueline F. Moloney**, Chancellor, Lowell Campus, Lowell, Massachusetts,

**Joseph Hartman**, Provost, Lowell Campus, Lowell, Massachusetts,

**Steven O’Riordan**, Vice Chancellor for Finance and Operations, Lowell Campus, Lowell, Massachusetts,

**Susan Puryear**, Director, Office of Research Administration, Lowell Campus, Lowell, Massachusetts,

**Julie Chen**, Vice Chancellor for Research & Innovation, Lowell Campus, Lowell, Massachusetts,

**Anne Maglia**, Associate Vice Chancellor, Research Administration, Lowell Campus, Lowell, Massachusetts,

### **President’s Office**

**Eric Heller**, Executive Director of the University of Massachusetts Donahue Institute

### **Worcester**

**Michael F. Collins**, M.D., Chancellor, University of Massachusetts Medical School, Worcester, Massachusetts,

**James Glasheen**, Executive Vice Chancellor Innovation & Business Development, University of Massachusetts Medical School, Worcester, Massachusetts,

**John C. Lindstedt**, Executive Vice Chancellor for Administration & Finance, University of Massachusetts Medical School, Worcester, Massachusetts,

**Katherine Luzuriaga**, M.D., Vice Provost for Clinical and Translational Research, University of Massachusetts Medical School, Worcester, Massachusetts,

**Janice Lagace**, Associate Director Research Funding Services, University of Massachusetts Medical School, Worcester, Massachusetts,

**Patti Onorato**, Managing Director, Clinical Delivery Solutions, Commonwealth Medicine, University of Massachusetts Medical School, Worcester, Massachusetts,

**Terence R. Flotte**, M.D., Dean, School of Medicine, Provost and Executive Deputy Chancellor, University of Massachusetts Medical School, Worcester, Massachusetts,

**James McNamara**, Executive Director, Office of Technology Management, University of

Massachusetts Medical School, Worcester, Massachusetts,  
**Marcy Culverwell**, Associate Vice Chancellor for Administration & Finance, University of  
Massachusetts Medical School, Worcester, Massachusetts,  
**Amy Miarecki**, Assistant Vice Chancellor, Grants and Contracts Administration, University of  
Massachusetts Medical School, Worcester, Massachusetts,  
**Danielle Howard**, Director Clinical Research Operations, University of Massachusetts Medical  
School, Worcester Massachusetts,  
**Matty Spragens**, Director of Sponsored Programs, University of Massachusetts Medical School,  
Worcester Massachusetts,  
**Lisa M. Colombo**, Executive Vice Chancellor for Commonwealth Medicine, University of  
Massachusetts Medical School, Worcester Massachusetts  
**Elizabeth Giehl**, Director of Grant Accounting and Compliance, University of Massachusetts  
Medical School, Worcester Massachusetts  
**Mark S. Klempner**, MD, Executive Vice Chancellor for MassBiologics of UMMS, , University  
of Massachusetts Medical School, Worcester Massachusetts

I further certify that Lisa A. Calise, Andrew W. Russell, Kumble R. Subbaswamy, Michael  
F. Malone, Carol P. Sprague, Jennifer A. Donais, Marcia Day, Laura J. Howard, Steven D.  
Goodwin, Marcelo Suárez-Orozco, Kathleen Kirleis, Joseph Berger, Bala Sundaram, Matthew L.  
Meyer, Shala A. Bonyun, Mark Fuller, Michael Goodman, Megan Hennessey- Greene, Ramprasad  
Balasubramanian, Michelle M. Plaud, Deborah Dolan, Jacqueline F. Moloney, Steven O’Riordan,  
Julie Chen, Joseph Hartman, Anne Maglia, Susan Puryear, Eric Heller, Michael F. Collins, MD,  
James Glasheen, John C. Lindstedt, Katherine Luzuriaga, MD, Janice Lagace, Patti Onorato,  
Terence R. Flotte, MD, James McNamara, Marcy Culverwell, Amy Miarecki, Danielle Howard,  
Matty Spragens, Lisa M Colombo, Elizabeth Giehl, and Mark S. Klempner are members of the  
University Administration with its principal office located at 333 South Street, Shrewsbury,  
County of Worcester, in the Commonwealth of Massachusetts.

Date: April 2, 2021

*Zunilka Barrett*  
Zunilka Barrett, Secretary to the Board of Trustees



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

1/5/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Arthur J. Gallagher Risk Management Services, LLC 470 Atlantic Avenue Boston MA 02210		<b>CONTACT NAME:</b> PHONE (A/C No, Ext): 617-261-8700 FAX (A/C No): 617-646-0400 E-MAIL ADDRESS:	
License#: BR-724491 UNV0FM-21		<b>INSURER(S) AFFORDING COVERAGE</b>	
<b>INSURED</b> University of Mass System 333 South Street Suite 400 Shrewsbury MA 01545		<b>NAIC #</b> 10020	
<b>INSURER A:</b> United Educators Ins, a Reciprocal Risk Retention		<b>INSURER B:</b>	
<b>INSURER C:</b>		<b>INSURER D:</b>	
<b>INSURER E:</b>		<b>INSURER F:</b>	

**COVERAGES**

CERTIFICATE NUMBER: 1052181448

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y		5/1/2022	5/1/2023	EACH OCCURRENCE	\$ 750,000
						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 750,000
						MED EXP (Any one person)	\$
						PERSONAL & ADV INJURY	\$ Included
						GENERAL AGGREGATE	\$ 3,000,000
						PRODUCTS - COMP/OP AGG	\$ Included
						Self Insured Retentl	\$ 250,000
	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY					COMBINED SINGLE LIMIT (Ea accident)	\$
						BODILY INJURY (Per person)	\$
						BODILY INJURY (Per accident)	\$
						PROPERTY DAMAGE (Per accident)	\$
							\$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$					EACH OCCURRENCE	\$
						AGGREGATE	\$
							\$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A			PER STATUTE	OTH-ER
						E.L. EACH ACCIDENT	\$
						E.L. DISEASE - EA EMPLOYEE	\$
						E.L. DISEASE - POLICY LIMIT	\$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 VR101 Comprehensive Assessment and IPE Training for NH BVR.  
 RFP 2023-VR-2, Staff Training Services for the NH Bureau of Vocational Rehabilitation.

**CERTIFICATE HOLDER****CANCELLATION**

NHED  
 25 Hall St.  
 Concord NH 03301

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Attachment B



# University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical School • UMassOnline

To Whom It May Concern:

The University of Massachusetts, as an entity of the Commonwealth of Massachusetts, is self-insured for Worker's Compensation in accordance with Chapter 152 of the Massachusetts General Laws.

If you have any questions or concerns, please contact me at 774-455-7616. Thank you.

Sincerely,

A handwritten signature in black ink, appearing to read 'Joshua Tucker', with a long horizontal flourish extending to the right.

Joshua Tucker  
Insurance Risk Analyst

## **University of Massachusetts Boston**

### **Mission Statement**

[https://www.umb.edu/the\\_university/mission\\_values](https://www.umb.edu/the_university/mission_values)

The University of Massachusetts Boston is a public research university with a dynamic culture of teaching and learning, and a special commitment to urban and global engagement. Our vibrant, multi-cultural educational environment encourages our broadly diverse campus community to thrive and succeed. Our distinguished scholarship, dedicated teaching, and engaged public service are mutually reinforcing, creating new knowledge while serving the public good of our city, our commonwealth, our nation, and our world.

## **Institute for Community Inclusion at the University of Massachusetts Boston**

### **Mission Statement**

<https://www.communityinclusion.org/about/mission/>

As practitioners, researchers, teachers, and advocates, we support systems change and partner with children and adults with disabilities, their families, and communities to advocate for personal choice; self-determination, and social and economic justice.

# Financial Statements

## Statements of Net Position

As of June 30, 2022 and 2021 (\$ in thousands). See accompanying notes to the financial statements.

Assets and liabilities	2022	2021
<b>Assets</b>		
<b>Current assets</b>		
Cash and cash equivalents	\$ 121,053	\$ 74,547
Cash held by state treasurer	25,054	22,242
Deposits with bond trustees	11,326	47,075
Accounts receivable, net	336,589	332,324
Lease receivable	16,464	13,561
Short-term investments	787,356	639,162
Other current assets	49,371	43,231
<b>Total current assets</b>	<b>1,347,213</b>	<b>1,172,142</b>
<b>Noncurrent assets</b>		
Cash held by state treasurer	30,177	23,734
Deposits with bond trustees	508,440	186,336
Accounts receivable, net	48,968	44,316
Lease receivable	317,654	277,502
Long-term investments	1,052,299	1,163,888
Other assets	17,462	16,768
Capital assets, net	5,527,062	5,435,274
<b>Total noncurrent assets</b>	<b>7,502,062</b>	<b>7,147,818</b>
<b>Total assets</b>	<b>8,849,275</b>	<b>8,319,960</b>
<b>Deferred outflows of resources</b>	<b>433,998</b>	<b>551,553</b>
<b>Liabilities</b>		
<b>Current liabilities</b>		
Accounts payable and accrued expenses	418,601	422,989
Unearned revenues and advances	126,065	100,044
Lease liability, current portion	15,047	11,322
Long-term debt, current portion	121,662	105,055
Commercial paper notes	20,000	31,000
Other current liabilities	82,066	70,396
<b>Total current liabilities</b>	<b>783,441</b>	<b>740,806</b>
<b>Noncurrent liabilities</b>		
Unearned revenues and advances	73,960	60,559
Lease liability	185,609	189,483
Long-term debt	3,545,711	3,121,427
Net pension liability	276,313	644,879
Net other postemployment benefits liability	485,141	829,808
Other long-term liabilities	99,490	100,436
<b>Total noncurrent liabilities</b>	<b>4,666,224</b>	<b>4,946,592</b>
<b>Total liabilities</b>	<b>5,449,665</b>	<b>5,687,398</b>
<b>Deferred inflows of resources</b>	<b>1,085,656</b>	<b>596,953</b>
<b>Net position</b>		
Net investment in capital assets	2,281,471	2,269,411
Restricted - Nonexpendable	22,515	22,378
Restricted - Expendable	262,669	232,833
Unrestricted	181,297	62,540
<b>Total net position</b>	<b>\$ 2,747,952</b>	<b>\$ 2,587,162</b>

## Statements of Revenues, Expenses, and Changes in Net Position

For the years ended June 30, 2022 and 2021 (\$ in thousands). See accompanying notes to the financial statements.

Revenues and expenses	2022	2021
<b>Operating revenues</b>		
Tuition and fees (net of scholarship allowances of \$369,902 at June 30, 2022 and \$345,128 at June 30, 2021)	\$ 1,007,124	\$ 930,613
Grants and contracts	719,479	667,149
Sales and services, educational activities	40,907	30,253
Auxiliary enterprises	434,129	163,821
Other operating revenues:		
Sales and services, independent operations	66,929	50,961
Sales and services, public service activities	321,954	334,567
Other	130,771	125,939
<b>Total operating revenues</b>	<b>2,721,293</b>	<b>2,303,303</b>
<b>Operating expenses</b>		
Educational and general		
Instruction	930,362	934,708
Research	551,367	550,593
Public service	71,649	88,770
Academic support	194,153	199,456
Student services	211,088	141,107
Institutional support	315,810	311,629
Operation and maintenance of capital assets	242,749	221,750
Depreciation and amortization	330,715	318,828
Scholarships and fellowships	121,334	85,500
Auxiliary enterprises	320,535	213,499
Other expenditures:		
Independent operations	58,582	53,485
Public service activities	253,420	260,697
<b>Total operating expenses</b>	<b>3,601,764</b>	<b>3,380,022</b>
<b>Operating loss</b>	<b>(880,471)</b>	<b>(1,076,719)</b>
<b>Nonoperating revenues (expenses)</b>		
Federal appropriations	5,588	5,953
State appropriations	880,003	845,481
Gifts	67,948	41,262
Investment return, net	(24,164)	35,406
Endowment return used for operations	34,944	31,965
Interest expense	(117,244)	(109,144)
Nonoperating federal grants	221,628	173,592
Other nonoperating income (loss)	(667)	5,779
<b>Net nonoperating revenues</b>	<b>1,068,036</b>	<b>1,030,294</b>
<b>Gain/(Loss) before other revenues, expenses, gains, and losses</b>	<b>187,565</b>	<b>(46,425)</b>
<b>Other revenues, expenses, gains and losses</b>		
Capital appropriations	87,062	62,592
Capital grants, contracts and gifts	8,846	8,528
Endowment return, net of amount used for operations	(148,089)	148,514
Other additions (deductions)	25,406	(16,869)
<b>Total other revenues, expenses, gains, and losses</b>	<b>(26,775)</b>	<b>202,765</b>
<b>Total increase in net position</b>	<b>160,790</b>	<b>156,340</b>
<b>Net position at beginning of year, as restated</b>	<b>2,587,162</b>	<b>2,430,822</b>
<b>Net position at end of year</b>	<b>\$ 2,747,952</b>	<b>\$ 2,587,162</b>

## Statements of Cash Flows

For the years ended June 30, 2022 and 2021 (\$ in thousands). See accompanying notes to the financial statements.

Cash flow	2022	2021
<b>Cash flows from operating activities</b>		
Tuition and fees	\$ 1,106,745	\$ 1,025,916
Grants and contracts	724,415	650,603
Payments to suppliers	(1,055,007)	(817,593)
Payments to employees	(1,766,320)	(1,595,504)
Payments for benefits	(561,537)	(465,580)
Payments for scholarships and fellowships	(122,685)	(89,267)
Loans issued to students and employees	(10,746)	(6,433)
Collections of loans to students and employees	18,619	15,094
Auxiliary enterprises	434,311	162,954
Sales and services, educational	40,750	30,543
Sales and services, independent operations	66,929	50,961
Sales and services, public service activities	312,617	339,788
Student related fiduciary activities inflows	15,012	9,520
Student related fiduciary activities outflows	(11,583)	(6,692)
Other receipts, net	131,112	115,530
<b>Net cash used for operating activities</b>	<b>(677,368)</b>	<b>(580,160)</b>
<b>Cash flows from noncapital financing activities</b>		
Federal appropriations	5,588	5,953
State appropriations	880,003	845,481
Grants, contracts and gifts for other than capital purposes	73,268	41,377
Nonoperating federal grants	221,628	173,592
Other noncapital financing activities	(816)	-
<b>Net cash provided by noncapital financing activities</b>	<b>1,179,671</b>	<b>1,066,403</b>
<b>Cash flows from capital and other financing activities</b>		
Proceeds from debt issuances	486,620	721,153
Proceeds from premiums received	26,327	71,803
Bond issuance costs paid	(2,423)	(3,992)
Swap termination payments	-	(50,938)
Capital appropriations	87,062	62,592
Capital grants and contracts	3,525	8,413
Proceeds from sales of capital assets	47,586	2,668
Purchases of capital assets and construction	(378,227)	(322,341)
Lease receipts	18,200	13,805
Interest on leases	5,180	3,950
Principal paid on debt and leases	(210,816)	(722,552)
Interest paid on debt and leases	(135,125)	(156,636)
<b>Net cash used for capital financing activities</b>	<b>(52,091)</b>	<b>(372,075)</b>
<b>Cash flows from investing activities</b>		
Proceeds from sales and maturities of investments	1,263,822	1,048,212
Interest on investments	25,990	54,561
Purchases of investments	(1,474,851)	(1,325,603)
Cash received from acquisition of subsidiary	76,943	-
<b>Net cash used for investing activities</b>	<b>(108,096)</b>	<b>(222,830)</b>
<b>Net (decrease) increase in cash and cash equivalents</b>	<b>342,116</b>	<b>(108,662)</b>
Cash and cash equivalents - beginning of the year	353,934	462,596
Cash and cash equivalents - end of the year	696,050	353,934

Cash flow	2022	2021
<b>Reconciliation of operating loss to net cash used for operating activities</b>		
Operating loss	(880,471)	(1,076,719)
Adjustments to reconcile loss to net cash used for operating activities:		
Depreciation and amortization expense	330,715	318,828
Changes in assets and liabilities:		
Accounts receivable, net	4,532	(5,275)
Other assets	(430)	12,659
Accounts payable and accrued expenses	(17,623)	85,044
Unearned revenues and advances	668	6,881
Other liabilities	15,352	8,788
Postemployment benefits liability, net	(107,520)	92,330
Fiduciary transactions	2,366	1,081
Changes in deferred inflows related to future revenues	(24,957)	(23,777)
<b>Net cash used for operating activities</b>	<b>(677,368)</b>	<b>(580,160)</b>
<b>Supplemental disclosure of noncash activities</b>		
Assets acquired and included in accounts payable and other liabilities	41,364	49,478
Assets acquired in exchange for lease obligation	483	-
Loss on disposal of capital assets	(10,845)	(12,083)
Donated assets	241	652



## Component Unit Statements of Financial Position

As of June 30, 2022 and 2021 (\$ in thousands). See accompanying notes to the financial statements.

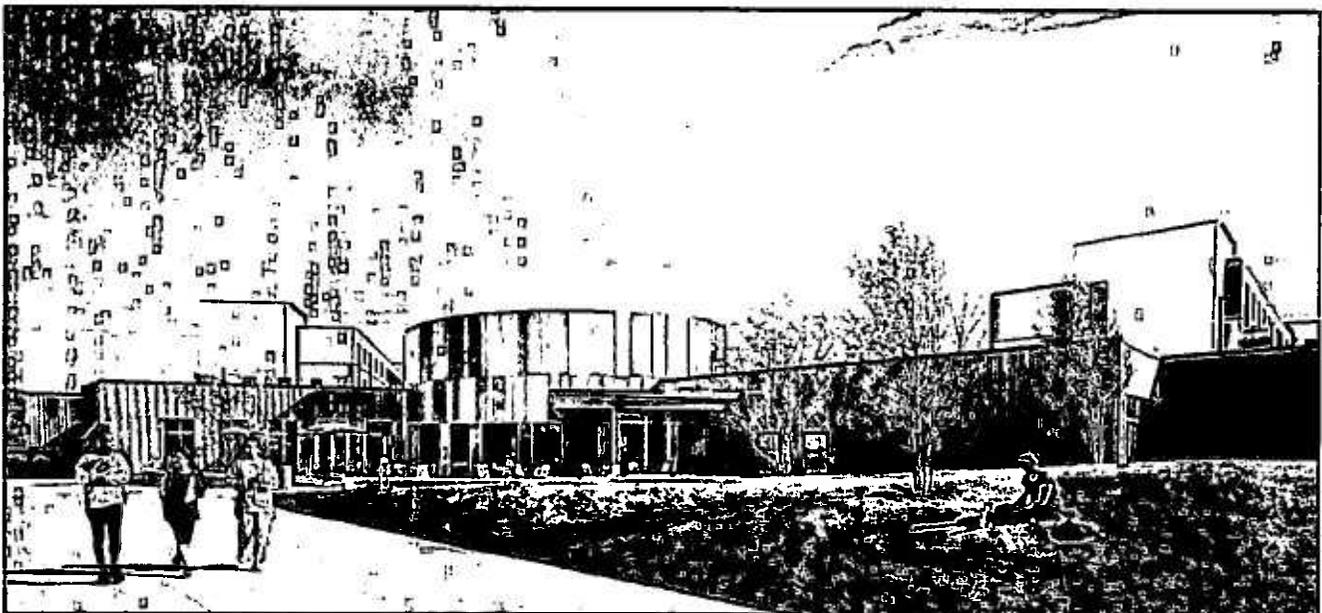
Component units	2022	2021
<b>Assets</b>		
Cash	\$ 2,654	\$ 733
Pledges receivable, net	170,929	26,499
Other receivables	873	3,200
Investments of the Foundations	1,731,288	1,905,099
Prepaid expenses and other assets	6,644	3,718
Land, property, plant and equipment, net	15,213	15,634
<b>Total assets</b>	<b>1,927,601</b>	<b>1,954,883</b>
<b>Liabilities</b>		
Accounts payable and accrued expenses	3,316	821
Deferred revenue	11,845	2,645
Obligations to beneficiaries of split-interest agreements	2,335	2,581
Assets held on behalf of others	935,331	1,108,178
<b>Total liabilities</b>	<b>952,827</b>	<b>1,114,225</b>
<b>Net assets</b>		
Without donor restrictions	52,776	46,521
With donor restrictions	921,998	794,137
<b>Total net assets</b>	<b>974,774</b>	<b>840,658</b>
<b>Total liabilities and net assets</b>	<b>\$ 1,927,601</b>	<b>\$ 1,954,883</b>



## Component Unit Statement of Activities

For the years ended June 30, 2022 and 2021 (with summarized financial information for the year ended June 30, 2020) (\$ in thousands).

Component units	Without donor restriction	With donor restriction	Total 2022	Total 2021
<b>Support and revenue</b>				
Gifts, bequests and grants	\$ 4,176	\$ 281,418	\$ 285,594	\$ 19,810
Other contributions	863	10,545	11,408	5,009
Total investment income, including net gains (losses) - net of fees	(148,169)	(140,965)	(289,134)	374,590
Investment management fee	12,528	-	12,528	12,309
Net assets released from restrictions	21,988	(21,988)	-	-
<b>Total support and revenue</b>	<b>(108,614)</b>	<b>129,010</b>	<b>20,396</b>	<b>411,718</b>
<b>Expenses</b>				
Distributions to University	42,894	(230)	42,664	35,265
Program services	5,546	-	5,546	5,786
Fundraising support	4,706	-	4,706	7,094
Administrative and general, Foundation	2,983	1,189	4,172	2,139
Administrative and general, University	1,185	-	1,185	-
<b>Total expenses</b>	<b>57,314</b>	<b>959</b>	<b>58,273</b>	<b>50,284</b>
<b>Excess of support and revenue over expenses</b>	<b>(165,928)</b>	<b>128,051</b>	<b>(37,877)</b>	<b>361,434</b>
Less: Fiscal year activity related to assets held on behalf of University	164,968	-	164,968	(156,127)
Less: Fiscal year activity related to assets held on behalf of Edward M. Kennedy Institute	7,879	-	7,879	(3,965)
Transfers (from) to other funds	(403)	403	-	-
Other	(261)	(593)	(854)	(343)
<b>Change in net assets</b>	<b>6,255</b>	<b>127,861</b>	<b>134,116</b>	<b>200,999</b>
Net assets, beginning of year	46,521	794,137	840,658	639,659
<b>Net assets, end of year</b>	<b>\$ 52,776</b>	<b>\$ 921,998</b>	<b>\$ 974,774</b>	<b>\$ 840,658</b>



# University Administration

As of November 2022

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## Appendix 1

### CURRICULUM VITAE (CV)

<b>NAME</b> Thelin, Russell	<b>POSITION TITLE</b> Senior Policy Fellow		
<b>EDUCATION/TRAINING</b>			
<b>INSTITUTION AND LOCATION</b>	<b>DEGREE (if applicable)</b>	<b>YEAR(s)</b>	<b>FIELD OF STUDY</b>
University of Utah	B.S.	1990	Sociology
Utah State University	M.S.	1994	Rehabilitation Counseling

### Positions and Employment

1990 – 1998	<i>Rehabilitation Counselor</i> , Utah State Office of Rehabilitation Division of Rehabilitation Services, Delta, Utah
1998 – 2001	<i>District Director</i> , Utah State Office of Rehabilitation, Division of Rehabilitation Services, West Valley City, Utah
2001 – 2003	<i>Client Services Coordinator</i> , Utah State Office of Rehabilitation, Division of Rehabilitation Services, Salt Lake City, Utah
2003 – 2005	<i>Administrative Services Director</i> , Utah State Office of Rehabilitation, Salt Lake City, Utah
2003 – 2013	<i>Adjunct Instructor</i> , Salt Lake Community College, Taylorsville, Utah
2005 – 2013	<i>Division Director</i> , Utah State Office of Rehabilitation, Division of Rehabilitation Services, Salt Lake City, Utah
2013 – 2015	<i>Executive Director</i> , Utah State Office of Rehabilitation, Salt Lake City, Utah
2015 – present	<i>Senior Policy Fellow</i> , Institute for Community Inclusion, UMass, Boston, MA
2019 – present	<i>Adjunct Instructor (Sociology)</i> , Joyce University, Draper, UT

### Other Experience and Professional Memberships

2023	<i>President Elect</i> , National Rehabilitation Association, Alexandria, Va.
2022-2025	<i>Member</i> , Board of Directors, Commission on Rehabilitation Counseling Certification, Schaumburg, Illinois
2022	<i>Certified Rehabilitation Leader (CRL)</i> , Commission on Rehabilitation Counseling Certification, Schaumburg, Illinois
1994 – Current	<i>Certified Rehabilitation Counselor (CRC)</i> , Commission on Rehabilitation Counseling Certification, Schaumburg, Illinois
2011 – Current	<i>Licensed Vocational Rehabilitation Counselor (LVRC)</i> , Department of Occupational & Professional Licensure, Salt Lake City, Utah
2021	<i>Member</i> , Commission on Rehabilitation Counselor Certification (CRCC) Rehabilitation Counselor Job Task Analysis Task Force, Schaumburg, Illinois
2010 - 2012	<i>President</i> , National Association of Rehabilitation Leaders (NARL), National Rehabilitation Association (NRA), Alexandria, VA.
2012 – 2014	<i>Chair</i> , Utah Defendant Offender Workforce Development (UDOWD) Committee, Salt Lake City, Utah
2013 – 2015	<i>Co-Chair</i> , Council of State Administrators of Vocational Rehabilitation (CSAVR) Management Committee
2013 – 2015	<i>Member</i> , Utah Statewide Workforce Innovation Board, Salt Lake City, Utah
2016 – 2017	<i>Co-facilitator</i> , Business Relations Data-Elements Community of Practice (CoP), Job Driven Vocational Rehabilitation Technical Assistance Center (JDVRTAC), UMass-Boston ICI, Boston, MA

## Publications

- Polychronis, S. C., Johnson, A., Thelin, R. J., Eggett, D. L., & Christensen, J. (2022). Use of an App With Embedded Video Modeling to Increase Eye Contact. *Focus on Autism and Other Developmental Disabilities*, 0(0). <https://doi.org/10.1177/10883576221124805>
- Thelin, R. & Walker, K. (2021). Coursework Curriculum-Transformational Rehabilitation Leadership Training (TRLT). University of Wisconsin-Stout.
- Marone, J., Thelin, R., & Mock, L. (2020). Launching and Supporting the SGA Project in Kentucky and Minnesota: Experiences and Perspectives of the Senior Technical Assistance Team. *Journal of Vocational Rehabilitation*, vol. Pre-press, no. Pre-press, pp. 1-10
- Thelin, R., & Grigal, M. (2019). Meeting the New Requirements of WIOA through Partnerships with Institutions of Higher Education Enrolling Students with Intellectual and Developmental Disabilities. VR and Youth Rehabilitation Research and Training Center Practice Brief, Issue No. 02. Rockville, MD: TransCen, Inc.
- Thelin, R., Grigal, M., & Sulewski, J. (2019). Summarizing Pre-Employment Transition Services and the Potential Role of Higher Education. VR and Youth Rehabilitation Research and Training Center Practice Brief, Issue No. 03. Rockville, MD: TransCen, Inc.
- Thelin, R. (2018). Are We Leaving Money on the Table? How Partnership Plus May Boost the Fiscal Stability of Inclusive Higher Education Programs. Think College Insight Brief, Issue No. 39. Boston, MA: University of Massachusetts Boston, Institute for Community Inclusion.
- Mitchell, D., Thelin, R., and Jefferson, D. (2017). Vocational Rehabilitation Working with Job-Driven Data: From Business Engagement to Employment: ReviewVR Issue No.12

## Professional Presentations

- Keynote presentation, Transition and Postsecondary Programs for Students with Intellectual Disabilities (TPSID) Project Directors Meeting, Tales from the VR Help Desk, online (2022)
- Presenter, Southeastern Postsecondary Education Alliance Conference, Emerging VR/IPSE Partnerships and Support for IPSE, Auburn, AL (2022)
- Presenter, South Dakota Vocational Rehabilitation Training Conference, Ethics: Integrity in Being a Rehabilitation Professional, Deadwood, SD (2020)
- Presenter, Kentucky Office of Vocational Rehabilitation Counselor Mentoring Program, The Bottom Line on Integrity: 12 Principles for Sound Ethics and Higher Returns, online (2020)
- Keynote Presenter, Fifth Annual Regional Summit on Post-Secondary Inclusive College Programs, Principles of Partnering: Building and Sustaining Meaningful Collaborations for Students with Intellectual Disabilities, online (2020)
- Presenter, Southeast Post-Secondary Education Alliance (SEPSEA), Inclusive Higher Education for Students with Intellectual Disabilities and VR: Successes, and How They Got There, online (2020)
- Co-Presenter, New Hampshire Bureau of Vocational Rehabilitation, An Agenda for Change: Transactional to Transformational Services, Concord, NH (2020)
- Co-Presenter, New Jersey Commission for the Blind and Visually Impaired (NJCBVI), Participative Leadership: Organizational and Cultural Change, Freehold, NJ (2020)
- Webinar, Tales from the Help Desk: Addressing Common Inquiries regarding Inclusive Higher Education and VR, (2019)
- Co-Presenter, Arizona Rehabilitation Services Administration, Leadership for Customer Service Excellence, Phoenix, AZ (2020)
- Co-Presenter, State of the Art (SOTA) Conference, Do You Speak VR? How to Build a Relationship with Your VR Agency, Reno, NV (2019)
- Co-Presenter, TPSID Project Director Meeting, Pathways to Work with Vocational Rehabilitation, Boston, MA (2019)
- Presenter, TPSID Project Director Meeting, Producing Pathways for Partnering between IHEs and Vocational Rehabilitation, Boston, MA (2019)
- Plenary Presenter, South Eastern Postsecondary Education Alliance (SEPSEA), Trust and Relationships, Partnerships between Vocational Rehabilitation and Postsecondary Education for

## CURRICULUM VITAE (CV)

NAME Cully, Julisa	POSITION TITLE Senior Policy Fellow
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### EDUCATION/TRAINING

INSTITUTION AND LOCATION	DEGREE	YEAR(s)	FIELD OF STUDY
Whittier College, Whittier, CA	B.A.	1996	Psychology
University of Massachusetts, Boston	M.Ed.	2002	Mental Health Counseling & Forensic Services

### Positions and Employment

2001 – 2002	<i>Intern / Clinician, Suffolk County Women's Resource Center, Sheriff's Department, Boston, MA</i>
2001 – 2008	<i>Part-time Outpatient Clinician, Bay State Community Services, Quincy, MA</i>
2002 – 2004	<i>Treatment Manager, Norfolk County Community Corrections, Sheriff's Department, Quincy, MA</i>
2004 – 2006	<i>Research Assistant, Massachusetts General Hospital Department of Child Psychiatry, Boston, MA</i>
2004 – 2005	<i>Research Coordinator, Commonwealth Research Center, Harvard Medical School, Boston, MA</i>
2005 – 2006	<i>Research Consultant, Commonwealth Research Center, Harvard Medical School, Boston, MA</i>
2008 – 2010	<i>Part-time Clinician, Eliot Human Services, Everett, MA</i>
2006 – present	<i>Knowledge Translation Program Director, ICI, UMass, Boston, MA</i>

### Other Experience and Professional Memberships

2002 – 2010	Member of the American Counseling Association (ACA)
2013 – present	Member of the National Leadership Consortium Network
2013 – 2016	Member of the National Association of Rehabilitation Research and Training Centers (NARRTC)
2014 – 2015	Co-facilitate of Employment for Transition Age Youth CoP
2014 – 2019	Advisory Board Member, Promise Technical Assistance Center
2015 – present	Advisory Board Member, National Clearinghouse of Rehabilitation Training Materials (NCRTM)
2019 – 2020	Employment Outreach Team, Knowledge Translation for Employment Research (KTER) Center
2021 – present	Center on Knowledge Translation for Employment Research (CeKTER) KT Learning Academy Nominal Process Group
2022 – present	Certified Rehabilitation Leader (CRL), Commission on Rehabilitation Counseling Certification, Schaumburg, Illinois

## Publications

- Boeltzig-Brown, H., Fleming, A.R., Heyman, M., Gauthier, M., Cully, J., Foley, S.M. (2017). A Systematic Review of State Vocational Rehabilitation Agency-Based Literature. *Rehabilitation Research, Policy, and Education*, Volume 31, Number 4, 2017, pp. 352-371(20).
- Boeltzig, H., Klemm, M., Fleming, A., Cully, J., Infante, P., Lewandowski, K., Gottshall, C., Szenamici, K., Luse, M.M., Mullins, T. (2010). *A Selected Look at the Literature Base on Vocational Rehabilitation and Implications for Future Research*. Report for the U.S. Department of Education, National Institute on Disability and Rehabilitation Research (U.S. DOE/NIDRR).
- Boeltzig-Brown, H., Fleming, A. R., Heyman, M., Gauthier, M., Cully, J., Foley, S. M. (2017). A systematic review of state vocational rehabilitation agency-based literature. *Rehabilitation Research, Policy, and Education*, 31, 352–371.
- Cully, J., Gandolfo, C., Foley, S., Haines, K., Taylor, A., Alford, M., Tashjian, M., Trivedi, K., Zhang, L., Kwan, N., Reposo, J., Mock, L., DeSantis, V., Thelin, R., Marrone, J., McNeil, N., Ford, L., Matrone, K., Miller, J., Potenger, P., Brigance T., St. Laurent, M. (2019, February). *The Job-Driven Vocational Rehabilitation Technical Assistance Center (JDVRTAC) Final Report*. Boston, MA: University of Massachusetts Boston, Institute for Community Inclusion.
- Cully, J., Mock, L, DeSantis, V., Gandolfo, C., Thelin, R. (2020). *VR Counselor Huddles: Accessing Virtual Mental Health Services Remotely*. Institute for Community Inclusion Review VR Brief, Issue 16.
- DeSantis, V., Cully, J., Mock, L, Gandolfo, C., Thelin, R. (2020). *VR Counselor Huddles: Agencies for the Blind Providing Services Remotely*. Institute for Community Inclusion Review VR Brief, Issue 20.
- Gandolfo, C., Cully, J., Mock, L, DeSantis, V., Thelin, R. (2020). *VR Counselor Huddles: Providing Job Search Assistance Remotely*. Institute for Community Inclusion Review VR Brief, Issue 19.
- Halliday, J., & Cully, J. (n.d). *Getting vocational rehabilitation and developmental disability agencies on the same page when serving individuals with developmental disabilities*. Institute Brief. Boston, MA: University of Massachusetts Boston, Institute for Community Inclusion.
- Hamner, Doris; J. Bose; S. Lopopolo and J. Cully. (2006). *Diabetes At Work: Balance and Control*. Institute for Community Inclusion Research to Practice Brief.
- Mitchell, D., McNeil, N., Hale, P., Cully, J. (2018). *Developing a VR Pipeline for Paid Work*

*Linda R. Mock*  
[Linda.Mock@umb.edu](mailto:Linda.Mock@umb.edu)

### **KNOWLEDGE, EXPERIENCE AND SKILLS**

- Excellent verbal and written communication skills
- Exceptional collaboration skills
- Effective work with Boards, Committees, Contributors, and Regulators
- Effective team leadership
- Strong policy development and implementation skills
- Solid program management skills
- Creative problem solving
- Excellent meeting facilitation skills
- Legislative work and presentations
- Strategic planning
- Successful grant writing, implementation, and administration
- Cross-cultural communication/sensitivity
- Ability to learn quickly

### **PROFESSIONAL EXPERIENCE**

#### **Institute for Community Inclusion**

**University of Massachusetts Boston**

- **Senior Policy Fellow**

**March 2013 to present**

Responsibilities: Provide technical assistance, coaching, training and assist with research regarding vocational rehabilitation and employment of individuals with disabilities. Worked on numerous Rehabilitation Services Administration (RSA) and National Institute on Disability Independent Living and Rehabilitation Research (NIDILRR) funded projects with multiple states including Substantial Gainful Activity (SGA), Job Driven Vocational Rehabilitation Technical Center,(JDVRTAC), Progressive Employment, Innovative Guided Rehabilitation Employment Engagement Training (iGreet), Workforce Innovation Technical Assistance Center (WINTAC )and Innovative Training On Improving Employment outcomes for people with ID, (IT's Employment). Experience includes the areas of transformational rehabilitation leadership, VR agency organizational and cultural change, rehabilitation supervision enhancement, business engagement and dual-customer employment service models and VR system service delivery improvement through rapid engagement strategies.

#### **Oregon Commission for the Blind**

**Portland, Oregon**

- **Administrator**

**December 2000 to December 2012**

Responsibilities: Serve as Administrator of the agency, with an annual budget of approximately \$8,000,000, providing leadership to a statewide program of comprehensive vocational rehabilitation and independent living services to Oregonians who are blind, with the mission of full participation in society. Specific duties include: Working closely with the Commission Board to provide strategic

direction to the agency; Development of program policies; Development of long and short-range goals and plans; Program evaluation; Budget preparation; Staff supervision; Interpretation of federal law and regulations; Representing the interests of the agency to stakeholders, and Preparing and delivering legislative presentations.

- **Director of Rehabilitation Services  
1988 to 2000**

Responsibilities: Directed statewide programs of rehabilitation services, which promote independence, and full participation in society of individuals who are blind. This program included vocational rehabilitation and independent living services, with a total budget of \$3,572,433 per year. Duties included: Interpreting federal law and regulations; Policy development; Strategic planning; development of long and short- term goals for rehabilitation services and the agency; Program evaluation and monitoring; Budget preparation; Direct supervision of 26 staff; Labor relations; Development, maintenance and funding of cooperative agreements with other agencies and educational programs; Development and supervision of Transition Program; Development and supervision of Supported Employment Program; Board and legislative presentations; Community presentations. During this time I led the agency transition into the Workforce Investment Act environment; and maintained good relationships with the Rehabilitation Services Administration.

- **Assistant to the Administrator and Director of Independent Living Services**

Responsibilities: Grant writing, public relations, staff training, program planning, special assignments, and program evaluation. I implemented and supervised a statewide Independent Living Program; Duties included grant writing, staff supervision, policy development, and program monitoring and evaluation.

- **Director, Orientation and Career Center**

Responsibilities: Directed the Orientation and Career Center, which provided training in adaptive techniques for individuals who are blind, including orientation and mobility, braille, low-vision aids, daily living skills, career exploration, and technology.

- **Rehabilitation Teacher/ Vocational Rehabilitation Counselor**

Responsibilities: Provided individualized instruction in daily living skills, academic and communication skills, Optacon, low-vision aids, and G.E.D. preparation for blind and deaf-blind clients; Evaluated communication and daily living skills; Assisted in life-work planning; Provided vocational rehabilitation services to deaf-blind clients and clients with developmental disabilities including counseling and guidance, job development, placement, follow-up and case documentation; Coordinated services between the state Commission for the Blind and other agencies; Provided consultation to staff and other agencies; Identified deaf-blind individuals in need of services.

## **Azusa Unified School District**

**Azusa, CA**

- **Transition Specialist for Visually Impaired Students**

Responsibilities: Developed and conducted a career education program for high school students with visual impairments including career exploration, arranging work experiences and teaching job-seeking and retention skills.

## **MARY DIBIASE:**

Institute for Community Inclusion, UMass/Boston, 100 Morrissey Ave., Boston, MA 02125  
Work Phone: 617-571-4419 | mary.dibiase@umb.edu

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### **EDUCATION**

Carroll College  
B.A. Psychology (1998)

Providence University (formerly, Univ. of Great Falls)  
B.A. Special Education, M.A. Secondary Education (2006)

### **POSITIONS AND EMPLOYMENT**

Institute for Community Inclusion (ICI), UMass/Boston (Boston, MA), **Training Associate (2020- present)**  
North Central Independent Living Services (Great Falls, MT), **Pre-ETS/Transitions Project Manager (2008-2020)**  
Conrad Public Schools (Conrad, MT), **Special Education Teacher (2010- 2015, 2018- 2019)**  
UM Rural Institute for Community Inclusion (Missoula, MT), **Pre-ETS Project Coordinator (2015- 2017)**  
Cut Bank Public Schools (Cut Bank, MT), **Special Education Teacher (2006-2010)**  
Montana Job Training Partnership, Inc. (Helena, MT), **Disability Program Navigator (2004-2006)**  
Montana Dept. of Labor, Job Service Division (Wolf Point and Missoula, MT), **Employment Services Case Manager and Supervisor (1998-2004)**  
Helena Industries, Inc. (Helena, MT), **Employment Specialist (1996-1997)**

### **SELECT ICI PUBLICATIONS AND RESOURCES**

ICI Tools for Inclusion (Issue no. 34, 2020): *Dealing with the Economic Impact of COVID-19 and Getting Financial Supports*  
ICI Tools for Inclusion (Issue no. 39, 2020): *Easy to Access Assistive Technology and Apps for Individual Success*; authored with David Hoff  
ICI Tools for Inclusion (Issue no. 45, 2020): *What is COVID-19 and Why Are So Many People Not Working?*

### **CURRICULA DEVELOPED AND PRESENTED**

Soft Skills for Employment: Preparing Youth for the Workplace	2015 - 2019
Student-led IEPs as the Ultimate Transition Tool	2016 - 2019
Opportunities for Youth with Disabilities to Develop Self-advocacy and Leadership Skills	2017 - 2019

### **CERTIFICATIONS**

Customized Employment Certification (June 2017)	Rural Institute for Community Inclusion
Discovery Process Certification (March 2019)	Marc Gold and Associates
Integrated Vocational Specialist Training (December 2019)	Montana Invest (through MT Voc. Rehab.)

## Neil C. McNeil

Institute for Community Inclusion University of Massachusetts Boston  
100 Morrissey Boulevard, Boston, Massachusetts 02125  
774 280 1265 [neil.mcneil@umb.edu](mailto:neil.mcneil@umb.edu)

### MANAGEMENT AND LEADERSHIP

- 16 years of experience in highly accountable role as Area Director of 3 vocational rehabilitation (VR) offices.
- Managed 25 VR counselors and support staff delivering employment services to individuals with significant disabilities.
- Developed leadership teams fostering performance culture marked by innovation & constant improvement of services.
- Consistently met or exceeded agency benchmarks for quantitative and qualitative outcomes; employed strategies that increased successful employment outcomes by 44% over a 4 year period.
- Assured cost effective/efficient services through monitoring of purchase of service budget & contracts over \$1 million.
- Mentored rehabilitation counselors and supervisors leading to promotions both within and outside of the agency.
- Spearheaded collaboration with One Stop Career Center resulting in \$300,000 US Department of Education Projects with Industry grant called *Career Quest* serving transition age young adults with disabilities.

### COUNSELING

- 20 years experience as licensed VR counselor.
- Taught & performed career assessment, job matching, job retention, interviewing and job search, résumé creation.
- Conducted assessments of individuals, couples, and families as an Employee Assistance Specialist; provided VR consultation for an inpatient substance abuse treatment program.

### TRAINING

- Developed & led in-service and university based seminars including: *Clinical Skills Training* for new VR counselors, *Vocational Recovery: Rehabilitation of Persons Recovering from Addiction*, *Organizational Change and Systems Thinking*, and the *Workforce Investment Act and Impact on the Public VR Program*

### EMPLOYMENT

**Institute for Community Inclusion** Boston, Massachusetts 2010 - Present  
*Senior Program and Policy Specialist* Provide technical assistance and consultation to state VR agencies as a member of the Region I Technical Assistance and Continuing Education team, Job Driven Vocational Rehabilitation Technical Assistance Center, and the Transition Pathways Services Model Demonstration Grant. Mentor, *Transformational Rehabilitation Leadership Training Program* University of Wisconsin-Stout/Institute for Community Inclusion, Commission on Rehabilitation Counselor Certification.

**Massachusetts Rehabilitation Commission** Quincy, Plymouth and Worcester Area Offices  
*Area Director* Managed field office providing VR services to persons with significant disabilities. Lead staff of 14 VR counselors and support personnel serving over 1600 clients in Worcester and surrounding communities. Responsible for purchase of service and administrative budget, personnel management including the recruiting, hiring and training of counselors and support staff, monitoring of contracts with vendors. Developed and maintained collaborative relationships with a range of community agencies, employment resources and programs including providers, One Stop Career Centers, community mental health agencies, Independent Living Centers, local high schools and community colleges.  
*Unit Supervisor* Clinical and administrative supervision, program planning and evaluation, training & staff development.  
*Vocational Rehabilitation Counselor* Provide vocational, personal and work adjustment counseling to persons with physical and psychiatric disabilities in the Worcester Area Office.

### EDUCATION

Providence College	Bachelor of Arts	Sociology
Assumption College	Master of Arts	Rehabilitation Counseling
Rutgers University	Certificate	School of Alcohol Studies
University of Oklahoma	Leadership Development Program	

### AFFILIATIONS/PROFESSIONAL ACTIVITIES

*Certified Rehabilitation Leader* Commission on Rehabilitation Counselor Certification  
Member/Co-Author, George Washington University, Washington, DC 33<sup>rd</sup> Institute on Rehabilitation Issues Prime Study Group Monograph: *Recruitment and Retention of V.R. Counselors*  
Team Leader, Massachusetts Rehabilitation Commission Strategic Planning Initiative: *Organizational Decision Making*

**Key Personnel**

**Institute for Community Inclusion, University of Massachusetts Boston  
VR101 Comprehensive Assessment and IPE Training for NH BVR**

**RESPONSE TO RFP 2023-VR-2 Staff Training Services for Bureau of Vocational Rehabilitation**

Names	Annual Salaries	Level of Efforts	Amounts		Total
			FY2023	FY2024	
Russell Thelin	\$ [REDACTED]	25%	\$ [REDACTED]	[REDACTED]	[REDACTED]
Julisa Cully	\$ [REDACTED]	25%	\$ [REDACTED]	[REDACTED]	[REDACTED]
Linda Mock	\$ [REDACTED]	20%	\$ [REDACTED]	[REDACTED]	[REDACTED]
Mary DiBiase	\$ [REDACTED]	23%	\$ [REDACTED]	[REDACTED]	[REDACTED]

**\*All figures were rounded to nearest dollar**