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Title I Adult and Dislocated Worker Intensive Services
Technical Assistance Conference
February 26, 2007 at 2:00 P.M.
San Jose One-Stop
Kirkwood Room

work2future staff present:
Colleen Arnold
Elizabeth Kaylor
Monique Melchor
Fran Vader
Kit Kwan
Suzanne Wolf

Others present:
Daniel Dishno (OTI De Anza)
Ingrid Duque (OTI De Anza)
Alan Nonnenberg (Crossroads Bible Church)
Linda Higgins (IBP)
David Mirrione (IBP)

Colleen: Good Afternoon, and thank you for coming. My name is Colleen Arnold and I am one of the work2future contracts analysts. Did everyone get a chance to sign in? And did you include your email when you signed in? Ok, great. My colleagues here are Elizabeth Kaylor, Fran Vader, Suzanne Wolf, Kit Kwan and Monique Melchor. I am glad you all were able to come this afternoon.

First on the agenda is the timeline, which was also included in the RFP. The main point on the timeline is the deadline to submit the proposal, which will be 3:00 P.M. on Friday March 23rd at the One-stop. You can mail them in or bring them in, but either way, we need to have them here by 3:00 P.M.

On Monday the 26th we begin the evaluation. The evaluation will begin with a brief look to make sure they have everything they are supposed to have in them, which is bolded in the RFP, and we will use the checklist at the back of the RFP, the Appendix A checklist, to make sure that everything is as it is supposed to be. Then all the ones that do have everything that they are supposed to have and are in the format that they are supposed to be in get forwarded to a committee to do the in-depth evaluation. After that, there are going to be interviews, we expect to be interviewing some or all of the proposers. When we get to that time we will call and schedule an interview time and date with you.

After that comes board approval, then you start working. There will be a short period when more training can happen, then services will begin July first. We expect that your services will be ready to begin on July first. Between the time the contract is awarded on May 18 and services begin on July first, there will be plenty of time to get up to speed. So we will be looking in your proposals, as we said in the RFP, for indication that your program will be ready to go on July first. Your staff will be in place and your programs will be ready.

We are looking for proposals from either a single agency or a collaborative. If a single agency is ready to provide all of the services requested in the RFP then we welcome a proposal from a single agency. We also welcome proposals from a collaborative, where a single agency acts as the lead and then subcontracts part of the services out. We may award the contract to a single provider, we may award one contract for case management and one for workshops, we may decide to do any, all or part of the services ourselves, or subcontract them out ourselves, but we are asking that you include case management, intensive services and workshops in your proposal.

One of work2future's major focuses is the Industry clusters. I have included a list of the industry clusters in your packets. (list was read) We recently had a consultant prepare a report of the retail industry. As a result of his findings, it has been determined that retail is not going to be a focus of our training efforts. The conclusion of the report was that the retail industry cluster is a viable industry cluster if it meets the needs of the people you are placing in that industry cluster: people who need part time work, people who need flexibility in their hours. But the conclusion of the report was that providing training in the retail sector was not something that the retail sector wanted, needed, or would find valuable. So we are not going to be focusing training efforts on the retail industry cluster, but we still feel that it is an important placement option for adults whose needs match it.

Another of our focuses is the common measures, which come down to us from the state in our regulations. The common measures are how the state measures us, and we filter that down to our contractors, on how we are doing. The common measures are (list was read). So those are the things we are measured on and the things we will be measuring you on. One thing about the common measures we need to tell you about is not specifically in the adult common measures, it is a youth measurement but it has a small amount to do with the adult and dislocated worker program, and that is the attainment of a certificate or a degree. Although that is a youth common measure, one part of it is going to be pertinent to our adult program too, and that is a change in the definition of what is recognized as a certificate. When we put the adults and dislocated workers into training, they need to attain a certificate and the definition of certificate has changed. It is now a nationally or industry wide recognized certificate, it can't just be any certificate that, for instance, Fred's Auto Body issues to people that it trains to do auto body work. It has to be a nationally or industry wide recognized certificate. This will have to do with the adult On-the-Job and Customized Training programs, and in the future we will be making sure that anyone who wishes to provide On-the-Job or Customized Training program is aware that their certification has to be national or industry recognized.

Daniel: What determines or what is the criteria for industry or nationally recognized certificate?

Colleen: Well we've been studying that, and I can get back to you with all the locations we have been finding out information about this, but what our Assistant Director has been discussing with us, is that a nationally recognized certificate would be something that, if a person gets their certification here, they could take that certification to another state and they would be able to use that certification as proof to somebody in the same industry that they received training, and that person in the other state would say, "Yes, I see that you are trained." Industry wide would be, for instance, if they were in the hospitality industry and if a certain hotel were training for example concierge, they could take their certification to another hotel, and that hotel would hire them as an already trained concierge.

Elizabeth: I think that the DOL took a crack at that definition, in Training and Employment Guidance Letter 17-05 in which they came up with that requirement so I'm sure that to the extent that they are willing to let us know what they meant by that, that you could find some information and a definition that would be applicable to use.

Colleen: and that TEGL is available at the website http://www.onestoppartners.org/ which is mentioned many places in your RFP.

Elizabeth: and in the common measures.

Linda: How is this information being passed along to all the training providers? Because a certificate from Computer Training Consultants is not going to be recognized by an industry in New York. For instance, someone who takes training to be a loan officer, or a book keeper.

Colleen: again, we are going to have to look at the TEGL and see how the individual training provider certificates that they are providing match to the common measures requirements of national or industry recognized. Since this is new, we don't have a lot of experience to go by on this, we are taking it on a case- by-case basis so far, provider by provider.

Daniel: As an example, we are a community college. The college issues certificates of completion for credit bearing courses. But let's say you do personal fitness training, so you get DeAnza's certificate in personal fitness trainer. Well there is also 6 or 7 certifying national board agencies across the country that you could also get nationally recognized certification in, but those tests cost anywhere from 150 to 250 dollars to take, and they are on a schedule. You have to travel to take these exams. So you have a DeAnza College certificate, but then there's the more industry recognized ones that do it on a nationally recognized certified basis, so the waters can get muddy very quick. For instance with our network security program. Foothill College issued a network security certification, but then we built into it that they would take the Security Plus exam, which costs $280. It is a secondary level of nationally

recognized certification exam that they may or may not pass, depending on how hard they study for that exam.
Colleen: I understand.
Daniel: And the other issue is, that industry may or may not even care.
Colleen: All of your points are very well taken and some of them are things we have already encountered in this. It sounds like we may need to have another meeting where we can get some guidance from the powers that be who direct us on this, and we can further clarify these things for you as they are clarified for us. I agree that these are difficult concepts to align things that are already in existence to when they change like this.
One of our ongoing things that hasn't changed too much is our Quality Index. It is a means of measuring the case management and services, the MIS portion and the corporate priorities. In this spreadsheet it breaks down what we are measuring. It has a one to five scale, and a number 5 indicates that everything is being done exactly as it is required in the contract, everything is being done clearly, consistently and exactly as it is supposed to be done. And then you go down the scale to a number one which means that things are not being done very well at all. This is basically how we are doing our contractor monitoring, this is the rating scale that we are expecting everyone to live up to.

The next thing is, the budget spreadsheets that I included in the RFP didn't translate very well in the PDF format in which the RFP went out. That was why I asked for your email on the sign in sheet, I will email you the spreadsheets and you can use them. I printed them out, but what doesn't show up on the printout on the lines that say insert personnel, etc, there is a button that adds lines and copies the formulas down. So you can use this spreadsheet and fill in your numbers and it will do the math for you. So if you have more than 4 staff members, you keep clicking the insert personnel button and keep adding more staff members on. The same with the workshop spreadsheets. If you have more workshops, you click the button and it will add more lines.
Alan: those are the training sessions?
Colleen: yes.
Colleen: the RFP is separated into two parts the case management part and the workshop part- there is a workplan for each, budgets for each and they are evaluated separately. The RFP will be evaluated as a whole but the points for workshops are added in differently than the points for case management. In the RFP there are examples of the workshops we think should be provided, that have worked out well for us before, but if you have innovative creative ideas for workshops add them in, and if you have ideas on how to combine workshops please provide them. We are looking for what you think would work well as well as what has worked well in the past.

Colleen: Annual State Allocation. This is where I have to tell you that if our funding goes down, we pass that on. We are subject to annual allocation from the state, and although we anticipate the amounts of money that are in the RFP, this may not end up being the case, and if it ends up not being the case, you need to understand that the funding may decrease.

Questions:

Daniel: if the funding goes down, then the services would be reduced?
Colleen: Yes, we would let you know in as timely a fashion as possible when that occurred, then we would rework the program.
Suzanne: It could work in reverse, as well, if the funding goes up.
Daniel: are churches eligible to be subcontractors?
Colleen Yes, basically any community-based organization is eligible, usually churches come under the CBO category.
Daniel: Can you send the PDF version as a word document, as there are certain things that have to be filled out?
Colleen: Yes, with a caveat that certain documents in the RFP were sent to us by the City Attorney and can't be changed. And some you can fill in and some you can't.
Monique: We can send them as forms.
Colleen: Are you referring to the Appendix forms?
Daniel: Yes, but also in the questions in the narrative. In section 3.2 where you are answering questions for the narrative, I copied the PDF and put it in a word document and I have 8 pages of questions, and that is a third of the document right there if you leave the questions in.
Colleen: But you are not supposed to. In your narrative you are just supposed to refer to the section, 3.2.1.etc.
Alan: About the numbers, you mentioned an expectation of 250 participants in each of the 2 programs, is that right? Are those new cases, or is this only about new cases, or how do you do this cutover in July?
Colleen: There are going to be carryover clients, and the 500 total does not take into account the carry over clients. So however many carry over clients there are at that time, you would be inheriting those carry over clients.
Alan: Is there a requirement to service those clients in addition to acquiring 250 + 250 new cases?
Colleen: Yes
Alan: What about on the workshop side?
Colleen: In the workshop side, we cannot say you must have workshops that have X number of clients in them, but we expect that you will provide workshops that clients want to attend, need to attend, sometimes will be referred to attend, and your workshops would be paid on a per workshop or per hour basis.
Alan: There is mention of 400 workshops during the course of the year and mention of a $400,000 budget for the workshops, does this imply that you anticipate $1000 per workshop?
Colleen: Approximately, some may be greater some may be lesser depending on the workshop.
Alan: And the attendance, a workshop for one person at $1000 is a very expensive workshop, but a workshop for 20 people is more reasonable.

Colleen: Again, we hope that the workshops you want to provide for us are workshops that people are going to need to and want to attend.
Alan: And the measures don't really take that into account, right? They are more end results, right? They aren't a measure of how popular or well attended or even effective the workshops are?
Colleen: The common measures measure how we as a WIB are doing overall. They don't really break down into how the workshops did or didn't contribute to that. So the workshops don't really enter into the common measures, but they might influence outcome.
Daniel: The clients that get referred to training through training providers- those are separate funds from this? The funds that pay for their training, that's not part of this budget?
Colleen: Correct- training funds are separate from this budget.
Alan: Training is separate from workshops?
Colleen: Yes, training is another service provided by WIA, in that some of our clients who can benefit by additional employment training, are referred to training by training providers on the ETPL list and get their training subsidized. That is different from the workshops that are provided generally here at the one stops, but they could be provided other places as well, for our clients- not necessarily enrolled clients, but any of our clients who can benefit by them.
Alan: So they are open to a broader audience, which could increase attendance? Are they a little bit less formal than the training?
Colleen: Yes, maybe, but not necessarily. It would depend on the workshop. I expect you to provide me with your curricula, I expect you to tell me how your workshops will benefit the clients.
Alan: And your comment about certificates is related more to training not to workshops?
Colleen: Yes, we don't expect you to come up with a nationally recognized certification of job readiness, for instance. I mentioned it because it has to do with our training providers and our On-the Job and Customized Training programs which some of our clients are referred to.
Alan: which are outside the scope of this RFP.
Colleen: Yes, these are employer based training programs, and the training is outside of the scope of this RFP but the referring to these trainings would be part of it.
Daniel: About the assessment tools- The Casas, Pesco and Workkeys- Is the contractor required to use the Casas, Pesco and Workkeys?
Colleen: Yes
Daniel: Are we required to purchase those tools?
Colleen: Yes
Daniel: And everything has to be in place and ready to go July first?
Colleen: Yes
David: On page 5 in the center, the last sentence of that paragraph, where it says that "The proposer's program should fit into activities and programs that are being carried out by others within the community, to ensure that these programs do not operate in isolation" Can you elaborate on that?

Elizabeth: Is that like one stop integration?
Colleen: It is in a way. We are asking that in your program, you play well with others that are doing similar things. We are not requiring collaboration this year, we have in the past, but we still are hoping that your program would not be operating in a vacuum, nor would it operate such that others would be having to operate in a vacuum. But again we are not requiring collaboration.
Elizabeth: I would like to elicit a little clarification on the workshops. For the workshops, we were looking at a $245 per hour charge for a workshop as being potentially excessive, so when I hear you saying $1000 per workshop, the RFP says *up to* $400,000. So depending on the scope of what the proposer was planning to provide, then $1000 per workshop might be appropriate but we would not be talking about one or two hours of workshop. We would expect far more to be provided, in view of the fact that we have already determined that $245 per hour was more than we should be paying for workshops.
Colleen: The workshop budget also does indicate the hours, number and hourly rate, and that is where we see what you are proposing. Rather than just $1000 per workshop, we want to see how that breaks down.
Alan: Where does the $245 come from?
Elizabeth: Past experience.
Alan: This year or last year?
Elizabeth: Last year
Alan: $245 per workshop or per hour?
Elizabeth: Per hour
Alan: Per hour of workshop? What is the average length?
Elizabeth: 2 or 3 hours
Linda: Most of them are around 3 hours.
Alan: So that would be $500-$750
Colleen: Again, it depends if your workshop is Dress for Success, or Microsoft Excel Intermediate.
Elizabeth: We were seeing that a flat rate was not really working, it penalized people who put far more into a workshop, where some people were just getting up in front of a bunch of people and talking for 2 hours.
David: On page 18- the program workplan narrative, including the one page summary not exceeding 25 pages, then there is cost allocation shall not exceed 5, the workshop plan shall not exceed 5, and the work shop cost allocation plan shall not exceed 5. Then at 3.2 where you have the bullets, there are bullets for the 2^{nd} 3^{rd} and 4^{th} of those, but as for qualifications and experience you don't mention a page requirement or limit. Is there one?
Colleen: No you can work those qualifications and experience into any or all of those 25 pages,
Elizabeth: Or none of them, as some of that is going to be in resumes and job descriptions, and so you may want to make reference to them to save space.
Linda: So the qualifications and experience is part of the 25-page workplan?
Colleen: Yes, its part of the overall workplan
Linda: If you choose to make it so.

David: The way I look at it, it is 3.2.1 then the workplan is 3.2.2, and that is not to exceed 25 pages, but that is before it, it looks like it is separate.
Colleen: Actually the qualifications and experience is the whole, the things under it, 3.2.1.1, organizational qualifications, are part of the qualifications.
David: I understand that, but if you follow that all the way and go to the next one, 3.2.2, which gives you a page limit, so based on your bullets, I would think that 3.2.1 is one thing, then 3.2.2 is another, etc
Elizabeth: Points well taken, but you are going to allude to the specific qualifications and experience that will allow you to provide the activities in the workplan. However you are not going to need to tell me what college everyone went to, but I can find that in a resume and discern the degree to which a certain applicant is going to meet the requirements based on their resume, and that is where the meat and potatoes are going to be but I can tell from the workplan who belongs to that set of qualifications.
Linda: Your first paragraph on your overview indicates the 3 one stops San Jose, Morgan Hill, and Gilroy. Are there plans to relocate Morgan Hill so that there is room for full service?
Colleen: Not that I know of. But we expect services to be available there, maybe not the full range of services available at the larger one stops, but we do expect clients to be able to at least meet with their case managers there.
Elizabeth: That is a good point, in light of the fact that we are looking to provide workshops, we need a certain amount of room for workshops.
Linda: you need a certain amount of room for workshops, you need a certain amount of room for case management, as in desk, privacy.
Elizabeth: So it will very likely be scaled back and it will very likely be determined specifically what those service will be during the negotiation of the contract.
Colleen: I'm sure we would need to be looking at this on the basis of looking at Morgan Hill, what you can provide there. But we would expect a minimum of case management and clients being able to meet with case managers there, and we will have to deal with the space to provide that and the level of privacy needed.
Alan: Is that not done today at that location?
Colleen: The Morgan Hill location is quite new and we do not as of yet have it fully up and running
Monique: Morgan Hill is actually a satellite location.
Alan: Does Gilroy have workshops?
Colleen: Yes there are workshops in Gilroy.
David: On page 23-j, "Describe the kind(s) of support services to be provided to Participants in addition to direct WIA services; these services include childcare, transportation, and health care." Childcare and healthcare, especially healthcare?
Colleen: I think I more specifically might have said "referral to childcare and healthcare. We don't expect you to provide childcare or healthcare yourselves.
David: What about the use of supportive services money? Could it be just a referral to an agency who provides those services

Colleen: We expect the case managers to help their clients to find these things not necessarily to give them to them themselves.
Linda: For non-financial partners, do we need a memorandum of understanding and a collaborators agreement?
Colleen: Yes. The MOU is [statement was interrupted]
Linda: It says financial
Colleen: I think at some point it also says non-financial. But what we are looking for is a documentation of the value of these services whether they are directly financial or non financial. Something that is state auditable
Linda: On Page 30 it says "Proposals submitted without a signed MOU for each proposed partner will be disqualified." So if it's a non-financial partner do you need an MOU?
Elizabeth: Do we really want to see an MOU? Yes. Will we disqualify you if you do not have a non-financial MOU? No.
Linda: Ok, what about the collaborators agreement that requires numerous signatures. Is that required in addition to the MOU?
Colleen: No. Is this what you are talking about, the MOU template?
Linda: No. Several years ago we had to have the MOU and the collaborators agreement.
Colleen: It's only an MOU and there is a format for it in the back that is a little less onerous than that.
Daniel: Of course you could pick up a new partner along the way.
Elizabeth: After services have been provided, yes, if it's approved.
Daniel: But going in the door…
Elizabeth: Going in the door we want to know who you are partnering with and what you intend for them to do.
David: Page 24, in the middle of the page- "Does the proposal provide a system of checks and balances to ensure an unbiased assessment of individual needs, and, where applicable, criteria for self-referral?" What is self-referral?
Colleen: If you are a training provider, and you anticipate referring clients to yourself as a training provider, what would the criteria be that would ensure that when we get monitored by the state, they won't say, "these case managers, are referring 99% of their training to this one training provider that has the same name as the case management provider."
Elizabeth: Or the whole idea of which services the clients need as opposed to which ones you feel like providing?
Colleen: We want to make sure that although there would be instances where it would be appropriate to refer clients to yourself as training provider or as service provider, we want to make sure it's not exclusive.
Alan: Is ESL considered a workshop?
Colleen: It could be, by all means included in a proposal. We anticipate that workshops could be anything that could provide a better chance at job search or career exploration or skills upgrade.
Alan: Are the cases that are generally handled in this program, the participants, generally or often in need of that training?

Colleen: That is one of the barriers to employment that we find and is generally accepted as one of the barriers that our clients have.
Alan: So of the 500, or all the registered clients, there could be some number that need that?
Colleen: yes, definitely.
Alan: Do workshops need to take place on the premises of the 3 locations or can they be off site?
Colleen: : We anticipate that there should be some workshops provided here on the premises but you could potentially have them off site as well. If they were off site you would be looking at how the clients would get there if they have transportation difficulties.
Alan: They have to get here, as well.
Colleen: That's true but one of the criteria that was used in the selection of this location for the One-stop was its proximity to public transportation.
Alan: Also is there any need or value to child care during workshops?
Colleen: I would say yes, however we are not able to have on-site child care here.
Daniel: But if was off site and it was free?
Alan: That might facilitate off site workshops.
Colleen: I can see that might be a need that might be addressed.
Colleen: Any other questions?
Daniel: What is the deadline to submit questions, and do we submit them by email?
Colleen: Yes, that is the only way we are accepting questions.
Daniel: Do we send them to you, directly, Colleen? And what is the method we will receive answers?
Colleen: I will send all the questions and the answers to all the questions to everybody who has their email on the sign-in sheet.
Linda: Up until what date, Colleen?
Elizabeth: Up until one week before the RFP is due, which if it's not referenced in the RFP it will be in the minutes of this Technical Assistance Conference, all of which will be posted on the websites referenced in the RFP as well
Alan: Are you recording this?
Elizabeth: Yes
Alan: Is that common practice?
Elizabeth: Yes, the better to make sure that all the potential proposers are receiving the exact same information.
Alan: So people that don't show up could receive it too?
Elizabeth: That's right.
Colleen: Well if there are no more questions, I thank you for coming and I look forward to hearing from all of you.