

**City of Oakland**  
**Agenda Report**

OFFICE OF THE CITY CLERK  
2005 JUL -7 PM 2:32

To: Office of the City Manager  
Attn: Deborah Edgerly  
From: Community and Economic Development Agency  
Date: July 19, 2005

Re: A Report and Resolution authorizing the City Administrator to implement the actions of the Oakland Workforce Investment Board as follows: 1) to negotiate and enter into a Memorandum of Understanding with the Oakland Private Industry Council, Inc. for up to three years to serve as the Oakland Workforce Investment Board's (Oakland WIB) System Administrator with an operating budget not to exceed \$1,300,000 for Fiscal Year 2005-2006; 2) to enter into a Memorandum of Understanding with the Oakland Private Industry Council, Inc. for up to three years to serve as the Oakland WIB's One Stop Career Center Operator with an operating budget not to exceed \$1,900,000 for Fiscal Year 2005-2006; and 3) to authorize the disbursement of additional funds to the Oakland Private Industry Council, Inc. under the following conditions: a) for subcontracts with Adult and Youth service providers as directed by the Oakland WIB; b) for the delivery of support services and training for the direct benefit of job seeker and business clients; and c) for the implementation of other grant agreements and programs for which the Oakland Private Industry Council, Inc. acts as System Administrator on behalf of the Oakland WIB

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**SUMMARY**

Following a competitive bidding process, the Oakland Workforce Investment Board (WIB) voted to award the Oakland Private Industry Council, Inc. (Oakland PIC) the roles of both the System Administrator and One Stop Career Center Operator through two separate memoranda of understanding (MOU) for a duration of up to three years, with a possible fourth year depending on performance. Funding levels for these roles may vary depending on the WIB's annual budget development process. The Workforce Investment Act stipulates that the WIB and the Mayor as the Chief Elected Official for Oakland must concur with such awards. The Oakland City Charter requires City Council approval of such awards as well. The WIB approved operating budget for fiscal year 2005-2006 for the Oakland PIC is \$1,300,000 for its role as System Administrator and \$1,900,000 for its role as One Stop Career Center Operator. The WIB also approved \$2,805,256 in direct service funds to be passed through the Oakland PIC for direct training and support services for its clients and for direct service sub-contracts. The direct service fund amount may increase should the system secure additional grants or contracts for Workforce Development.

**FISCAL IMPACT**

The funding approved by the Oakland WIB for the two recommended awards and pass through funds, which total \$6,005,256, are appropriated in the City's FY 2005-2007 Policy Budget (Fund 2195, Project G207710). There is no direct impact on the City's general fund pertaining to these

Item: 16  
City Council  
July 19, 2005

awards. Funding for Oakland PIC operations and direct services will vary from year-to-year depending on the availability of Workforce Investment Act formula and discretionary funding.

## BACKGROUND

The Oakland WIB voted in June 2002 to issue an RFP prior to awarding another two-year MOU to the Oakland Private Industry Council. The City Council took the same action in July 2002. In September 2003 the WIB voted to delay the release of the RFPs for one year. At the same time, the WIB adopted a One Stop System Framework document which delineated the distinct roles of the System Administrator and One Stop Career Center Operator, and which later served as the foundation for the RFPs. The WIB's action in delaying the RFPs for one year included a direction that the Oakland Workforce Investment Area begin implementing the System Framework immediately. In July 2003, the City Council agreed to the one year delay, with conditions consistent with the One Stop System Framework document developed by the WIB, which included the use of two separate MOUs to differentiate the roles of the System Administrator and of the One Stop Career Center Operator.

Staff began producing the RFPs early in 2004 and finalized them in the summer of 2004 under the guidance of the WIB's One Stop Leadership Committee. That guidance included an RFP review team of three workforce development professionals with extensive experience in program management, grant writing and procurement. The review team and One Stop Leadership Committee gave the RFPs their final approval in July 2004.

## ISSUES AND IMPACT

1. Staff released the RFPs on September 7, 2004, based on the action in September 2003 by the WIB to defer the release of the RFPs for one year only, and on the action in January 2004 by City Council to accept the deferral for one year only. Following the release of the RFPs, there were a number of lengthy discussions at regularly scheduled WIB meetings and special meetings on the merits of going forward with the competitive bidding process as well as on the RFP language and rating process. A special "Re-review" workgroup was formed in acknowledgement of the concerns that were raised and the due date of the proposals was pushed back to January 5, 2005. The WIB ultimately adopted changes in the language and ranking systems of the RFPs that placed a higher value on local experience and a lesser value on required cash match. In addition, the WIB adopted a proposal review and rating process (**Attachment A**) that included the hiring of an independent outside facilitator to recruit three workforce development experts from outside of Oakland, and to guide them in reading and ranking the proposals. The approved review process also included interviews of the finalists to be conducted by those readers along with the WIB Chair and Vice Chair. The WIB explicitly gave staff no formal role in ranking the applicants. The WIB also approved a motion requesting that the City Council send the award decision back to the WIB should the Council disagree with the WIB's decision(s). The City Council declined the request, and directed staff to present the applicants in rank order.

*The readers and the WIB Chair and Vice Chair interviewed each of the applicants. Following the interviews, the readers submitted their scores based on the approved rubric. The*

Item: \_\_\_\_\_  
City Council  
July 19, 2005

interview panel did not formulate a recommendation or rank the applicants. The readers' scores were based primarily on the content of the proposals, and weighted the interview only to the extent that applicant responses clarified questions raised from the written proposals. **Attachment B** shows these scores, together with short summaries of each proposal, as they were presented to the WIB's Executive Committee on March 24, 2005, and to the full WIB on April 7, 2005.

2. The Office of Contract Compliance and Employment Services conducted a standard review of the five proposals that were submitted for both RFPs to determine compliance with the City's Local Business Enterprise and Small Local Business Enterprise (L/SLBE) Ordinances and to assign preference points for the applicants. The two applicants for the One Stop Operator RFP—the Oakland Private Industry Council and ACS State and Local Solutions—received three and two L/SLBE preference points respectively for their proposals. There were three applicants for the System Administrator RFP: TTI America, the Oakland PIC (a local certified non-profit) and Primus Consulting Group. TTI America and Primus Consulting Group each received two L/SLBE preference points for their proposals. The Oakland PIC did not achieve the 20% L/SLBE program requirement and was deemed “non-responsive” by the Office of Contract Compliance and Employment Services, because the PIC's proposal did not meet the requirement that at least 10% of the contract value be performed by a Small Local Business Enterprise. In response to the Oakland PIC's challenge of the L/SLBE policy, City staff spent several weeks working with the Oakland PIC to address the compliance policy questions, such as recommending that the PIC tabulate the value of its vendor agreements with local suppliers or that it consider sub-contracting 10% of its system administration function to a small local organization. In the final analysis, the PIC felt that it could not achieve the minimum 20% participation requirement within its existing organizational structure and operations. While the other applicants could build a team with local partners, the Oakland PIC felt that its staffing structure was already locked in place and was unable to implement the subcontracting or procurement options that could bring it into compliance with the L/SLBE policy.

The attached compliance analysis (**Attachment D**) reflects the 10% local participation proposed by the Oakland PIC, thus rendering a shortfall of 10% small local participation. Both TTI America and Primus Consulting Group were able to meet the requirement with small local businesses as subcontractors.

**WIB – One Stop System Administrator**

Contractor	LBE	SLBE	Total	Preference Points Achieved
TTI America	0%	21%	21%	2
Oakland Private Industry Council	10%	0%	10%	0
Primus Consulting Group	0%	20%	20%	2

Item: \_\_\_\_\_  
City Council  
July 19, 2005

3. Finally, the RFP for System Administrator, drawing from the language of the One Stop System Framework, required that applicants bidding on both RFPs submit a statement of how they would manage conflict of interest. Three areas that dealt with managing conflict of interest were scored on a Pass/Fail basis:
  - Equitable performance accountability function
  - Equitable contracting function
  - Equitable allocation of support service and dedicated training funds

Two of the readers failed the Oakland PIC on the “Equitable allocation of support service and dedicated training funds” element of the System Administrator scoring rubric (**Attachment B**). The same two readers neither failed nor passed the Oakland PIC in the area of “Equitable contracting function.” According to consultant John Baker, who was hired by the WIB leadership to facilitate the reader selection and rating process, the readers mainly directed their attention to equitable allocation of support service and dedicated training funds. In the Oakland PIC’s dual role, the readers did not think that this had adequately been addressed. The readers did not see how the Oakland PIC could establish itself as a neutral party in deciding the allocation of funds when they themselves are one of the recipients. According to John Baker’s interpretation of the readers’ concerns, the perceived conflict cannot be resolved as long as this (allocation) function continues to reside in the System Administrator that also serves as a One Stop Operator.

The WIB was aware of these issues when it decided to award the two MOUs to the Oakland PIC.

## **WIB AWARD PROCESS AND RECOMMENDATIONS**

### **SYSTEM ADMINISTRATOR**

Three organizations submitted proposals to serve as Oakland’s System Administrator:

- The Oakland Private Industry Council, Inc: a non-profit agency with more than 20 years of experience in administering federal job training funds and providing services to youth and adults. Their bid was for \$1,300,000 with a cash and in-kind match declaration of \$195,000.
- Primus: a newly established for-profit entity based in Fresno that serves the Fresno Workforce Investment Area. Their bid was for \$1,250,000, with no quantified match declaration. Their proposed local partner was Policy Innovations Works, Inc.
- TTI America: A for-profit conglomerate of businesses that specialize in education and employment and training services. Their bid was for \$1,150,000, with a cash and in-kind match declaration of \$296,250. Their proposed local partners were Pyramid Business Systems and Patel and Associates.

Item: \_\_\_\_\_  
City Council  
July 19, 2005

With the average of all of the readers' scores, and with Contract Compliance Preference Points factored in, the applicants scored as follows:

- Oakland PIC: 88.0
- TTI America: 83.7
- Primus: 75.7

Proposal reviewers quickly reached consensus that the proposal from Primus was not competitive. The following synopsis details key elements from the readers' scores of the two competitive proposals, per the WIB scoring rubric:

Organizational Capacity: the Oakland PIC scored on average 4.3 points more than TTI America, out of 35 possible points, with over 60% of the variance stemming from the "Experience operating comparable programs in Oakland..." category.

Service Delivery Plan: the Oakland PIC outscored TTI America by an average of 4.0 points per reader.

Budget Detail and Value: TTI America outscored the Oakland PIC by an average of 2.0 points per reader.

Managing Conflict of Interest: only the PIC had to address this section since they were the only applicant to bid on both RFPs. There were three Pass/Fail categories in this section. The readers passed the PIC in one category (Equitable performance accountability), were indecisive on one category (Equitable contracting) and failed the PIC on the third category (Equitable allocation of resources).

Bonus Points for Match: the Oakland PIC and TTI America tied.

L/SLBE Preference Points: TTI America received 2.0 out of a possible 5.0 points; the Oakland PIC received no points.

#### **ONE STOP CAREER CENTER OPERATOR**

The organizations that submitted proposals were:

- ACS State and Local Solutions: a for-profit business that specializes in administering workforce development systems and running One Stop Career Centers in 16 states and over 100 service sites. Its bid was for \$2,400,000 with a cash match declaration of \$138,000 for the first year. Their proposed Intensive Services client level was 1,006, with a 93% client placement rate within two years of enrollment. Their proposed local partners were the Hispanic Chamber and the YWCA.
- The Oakland Private Industry Council: a well-established non-profit that has been operating and supporting One Stop Career Centers since 1996. Their bid was also for \$2,400,000, with \$450,000 of that going to two existing Affiliate One Stop Career Centers (Lao Family

Item: \_\_\_\_\_  
City Council  
July 19, 2005

Community Development and the Unity Council) and \$50,000 for two new One Stop “portals” (Allen Temple’s J. Alfred Smith Training Academy and the Regional Technical Training Center). Their cash match declaration for year one is \$345,000. Their proposed Intensive Services client level was 360, with an 80% client placement rate within two years of enrollment.

With all of the readers’ scores and Contract Compliance Preference Points factored in, the applicants scored as follows:

- Oakland Private Industry Council: 89.7
- ACS State and Local Solutions: 83.3

The following is a synopsis of the readers’ scores per the rubric:

Organizational Capacity: The Oakland PIC outscored ACS by an average of 5.7 points, with 75% of the variance stemming from the “Experience operating comparable programs in the City of Oakland...” category.

Service Delivery Plan: ACS and the Oakland PIC were virtually tied, with ACS scoring 0.7 points per reader higher on average than the PIC.

Budget Detail and Value: ACS outscored the PIC by an average of 1.7 points per reader.

Bonus Points for Match: the Oakland PIC outscored ACS by 2.0 points.

L/SLBE Preference Points: the Oakland PIC received 3.0 points and ACS received 2.0 points.

From the readers’ perspectives, the Oakland PIC’s greatest strengths were in its local experience and in its commitment to generate a substantial amount of matching funds (\$345,000 in cash and in-kind) as the One Stop Career Center Operator. Although the readers believed that Oakland should be serving a greater number of Intensive Services clients, they questioned ACS’s to ability retain service quality while working with such a high number of clients, and also had concerns about their low staff salary levels.

## **WIB DECISIONS**

John Baker, principle owner of Strategies for the Future, facilitated the reader selection and review process for the WIB. He presented a detailed summary of the review process and the readers’ scores and perceptions to the WIB Executive Committee on March 24<sup>th</sup> and to the full WIB on April 7<sup>th</sup>. The Executive Committee voted to recommend to the full WIB that the Oakland PIC be awarded the One Stop Career Center Operator MOU, with the caveat that funding and levels of service were still open to negotiation through the WIB budget development process. The Executive Committee did not make a recommendation on the System Administrator proposals.

On April 7<sup>th</sup>, the full WIB voted unanimously to award both MOUs to the Oakland PIC. On June 23<sup>rd</sup>, the WIB adopted its FY 2005-2006 budget (**Attachment E**), which granted the award amounts as proposed by the Oakland PIC in both of its RFP applications.

### **Staff Observations**

As challenging as this RFP process has been, it should yield significant benefits to Oakland's workforce development system by lowering the projected costs per participant and placements for the coming years (**Attachment F**). This reduction in costs will be achieved primarily through a strengthened network of program partners, most of which bring additional resources to our workforce system, including the total of \$540,000 in non-Workforce Investment Act (WIA) cash and in-kind match the Oakland PIC declared it would generate to support Oakland's workforce development services.

A problem the RFP and WIB budget development process has brought to the fore, however, is the unusual oversight structure that exists in Oakland. Many members of the WIB and community at large expressed concerns about the amount of money Oakland uses to administer and support its workforce development system—a total of \$2,168,214, which is \$1,300,000 for the Oakland PIC and \$868,214 for the City. Many people also expressed concern about the City's lack of general fund support for the administration functions of the Workforce Development Unit, despite that fact that the City has generated more than \$3,000,000 in new direct services funding to support job training programs in the past two years. To address these concerns, the WIB has charged two of its standing committees to look into the issues of system administration and support costs and the issue of matching funds.

Typically, the entities designated as Workforce Investment Areas, such as cities, counties, or consortia of counties, serve as their own System Administrators. Oakland's bifurcated administrative and program support structure is unique. The City of Oakland, as the Sub-Grant Recipient and Fiscal Agent of Workforce Investment Act funding, is ultimately responsible for the *appropriate management and administration of those funds*. Therefore, it is incumbent upon that City to perform critical oversight and support functions, including financial management, procurement of services, program monitoring and compliance with state and federal regulations, as well as program development and management, and technical support to service providers. The Oakland PIC also performs these and other functions. Staff believes that, in conjunction with the WIB's examination of Oakland's workforce administration and program support system, that it should conduct a study that includes an assessment of the structures of comparable workforce investment areas and then come back to the City Council with options and recommendations for its consideration at the one year anniversary date of the MOUs.

## **SUSTAINABLE OPPORTUNITIES**

Economic: The services highlighted in this report improve the economic well-being of thousands of Oakland residents through the availability of self-directed job search resources and assistance and intensive training, support, case management and job development services.

Environmental: The project has no direct environmental impact.

Social Equity: The vast majority of the clients that receive intensive services from Oakland's workforce development system are unemployed or underemployed.

## **DISABILITY AND SENIOR ACCESS**

Among the targeted populations served by Oakland's workforce development system are low income senior citizens served by the ASSETS Older Workers Program.

## **RECOMMENDATIONS AND RATIONALE**

Staff recommends that the City Council adopt the Resolution authorizing the City Administrator to implement the actions of the Oakland Workforce Investment Board as follows: 1) to negotiate and enter into a Memorandum of Understanding with the Oakland Private Industry Council, Inc. for up to three years to serve as the Oakland Workforce Investment Board's (Oakland WIB) System Administrator with an operating budget not to exceed \$1,300,000 for Fiscal Year 2005-2006; 2) to enter into a Memorandum of Understanding with the Oakland Private Industry Council, Inc. for up to three years to serve as the Oakland WIB's One Stop Career Center Operator with an operating budget not to exceed \$1,900,000 for Fiscal Year 2005-2006; and 3) to authorize the disbursement of additional funds to the Oakland Private Industry Council, Inc. under the following conditions: a) for subcontracts with Adult and Youth service providers as directed by the Oakland WIB; b) for the delivery of support services and training for the direct benefit of job seeker and business clients; and c) for the implementation of other grant agreements and programs for which the Oakland Private Industry Council, Inc. acts as System Administrator on behalf of the Oakland WIB.

The Oakland Workforce Investment Board is mandated under the Workforce Investment Act to select the One Stop Operator and to make major policy and budgetary decisions in partnership with the chief elected official of a designated area—which in the case of Oakland is the Mayor. Under the WIB's direction, staff hired an outside facilitator who assembled a panel of independent experts in workforce development who ranked the proposals using the scoring system approved by the WIB. The Oakland PIC scored the highest in both areas. In this light, staff believes its obligation is to present the recommendations set forth by the WIB for Council consideration.

Staff also recommends that the City Council consider the issues raised by the WIB regarding the structure and costs of Oakland's workforce administration and program support system.

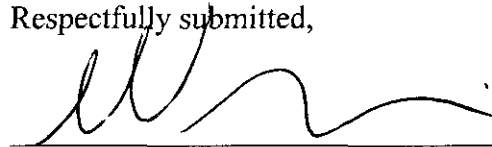
Item: \_\_\_\_\_  
City Council  
July 19, 2005



**ACTION REQUESTED OF THE COUNCIL**

Staff requests that the City Council adopt the Resolution that reflects the decision of the Oakland Workforce Investment Board, while also giving consideration to streamlining and reducing the costs of Oakland's workforce development administration and program support system.

Respectfully submitted,



DANIEL VANDERPRIEM

Director of Redevelopment, Economic  
Development and Housing

Prepared by: Al Auletta  
Manager, Workforce Development Unit  
CEDA

APPROVED AND FORWARDED TO THE  
CITY COUNCIL



Office of the City Administrator

**ADDITIONAL RFP PROCESS AND WIB BUDGET INFORMATION:**

The following attachments referenced in this report provide additional detail regarding aspects of the Oakland WIB's RFP processes and subsequent WIB budget allocations for the 2005-06 period:

**Attachment A:** Oakland WIB RFP proposal review and selection process, adopted December, 2004

**Attachment B:** RFP Proposal Summaries and Reader Scores

**Attachment C:** Executive Summaries and Budget Narratives from each RFP Applicant Proposal

**Attachment D:** City of Oakland Contract Compliance analysis

**Attachment E:** Oakland WIB budget for FY 2005-06, approved June 23, 2005

**Attachment F:** Oakland Adult service provider performance history and 05-06 allocations

Item: 16  
City Council  
July 19, 2005

2005 JUL 9 11:32  
Deputy City Attorney

## OAKLAND CITY COUNCIL

RESOLUTION No. \_\_\_\_\_ C.M.S.

INTRODUCED BY THE CITY ADMINSTRATOR

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**A Resolution authorizing the City Administrator to implement the actions of the Oakland Workforce Investment Board as follows: 1) to negotiate and enter into a Memorandum of Understanding with the Oakland Private Industry Council, Inc. for up to three years to serve as the Oakland Workforce Investment Board's (Oakland WIB) System Administrator with an operating budget not to exceed \$1,300,000 for Fiscal Year 2005-2006; 2) to enter into a Memorandum of Understanding with the Oakland Private Industry Council, Inc. for up to three years to serve as the Oakland WIB's One Stop Career Center Operator with an operating budget not to exceed \$1,900,000 for Fiscal Year 2005-2006; and 3) to authorize the disbursement of additional funds to the Oakland Private Industry Council, Inc. under the following conditions: a) for subcontracts with Adult and Youth service providers as directed by the Oakland WIB; b) for the delivery of support services and training for the direct benefit of job seeker and business clients; and c) for the implementation of other grant agreements and programs for which the Oakland Private Industry Council, Inc. acts as System Administrator on behalf of the Oakland WIB**

**WHEREAS**, the Oakland Workforce Investment Board (WIB) is mandated by the Workforce Investment Act of 1998 to oversee the expenditure of Workforce Investment Act funding in partnership with the Chief Elected Official (the Mayor) in a designated Workforce Investment Area such as the City of Oakland; and

**WHEREAS**, the Oakland WIB conducted a competitive bidding process for the distinct roles of System Administrator and One Stop Career Center Operator to support the administrative and program structure of Oakland's workforce development system under the auspices of the City as the Sub-Grant Recipient and fiscal agent for Workforce Investment Act funding; and

16  
ORA/COUNCIL  
JUL 19 2005

**WHEREAS**, the Oakland WIB voted to award the Oakland Private Industry Council, Inc. \$1,300,000 for its role as System Administrator in fiscal year 2005-2006 and \$1,900,000 for its role as One Stop Career Center Operator in fiscal year 2005-2006; and

**WHEREAS**, the City Council has appropriated the funding for these two awards as well as additional "pass through" program funds (Fund 2195; Project G207710) to the System Administrator for direct client training and support services and program sub-contracts for direct client services as approved by the Oakland WIB; and

**WHEREAS**, the two request for proposals through which these two awards by the Oakland WIB were processed states, in accordance with the City Charter, that the City Council must authorize these awards and agreements; and

**WHEREAS**, the Oakland City Council on February 2, 2005 directed staff to prepare a report on the ranking of all applicants in the competitive bidding process; and

**WHEREAS**, the City Council finds and determines that the services provided pursuant to the contract authorized hereunder are temporary and of a professional, scientific or technical nature; and

**WHEREAS**, the City Council finds that this contract shall not result in the loss of employment or salary by any person having permanent status in the competitive service; now, therefore, be it

**RESOLVED:** That the City Administrator is hereby authorized to implement the actions of the Oakland Workforce Investment Board as follows: 1) to negotiate and enter into a Memorandum of Understanding with the Oakland Private Industry Council, Inc. for up to three years to serve as the Oakland Workforce Investment Board's (Oakland WIB) System Administrator with an operating budget not to exceed \$1,300,000 for Fiscal Year 2005-2006; 2) to enter into a Memorandum of Understanding with the Oakland Private Industry Council, Inc. for up to three years to serve as the Oakland WIB's One Stop Career Center Operator with an operating budget not to exceed \$1,900,000 for Fiscal Year 2005-2006; and 3) to authorize the disbursement of additional funds to the Oakland Private Industry Council, Inc. under the following conditions: a) for subcontracts with Adult and Youth service providers as directed by the Oakland WIB; b) for the delivery of support services and training for the direct benefit of job seeker and business clients; and c) for the implementation of other grant agreements and programs for which the Oakland Private Industry Council, Inc. acts as System Administrator on behalf of the Oakland WIB; and be it

**FURTHER RESOLVED:** That the City Administrator and her designee are hereby authorized to take whatever action is necessary with respect to the System Administrator and One Stop Career Center Operator Memoranda of Understanding consistent with this Resolution and its basic purposes.

IN COUNCIL, OAKLAND, CALIFORNIA,

2005

**PASSED BY THE FOLLOWING VOTE:**

AYES- BROOKS, BRUNNER, CHANG, KERNIGHAN, NADEL, QUAN, REID, AND  
PRESIDENT DE LA FUENTE

NOES-

ABSTAIN-

ABSENT-

Attest: \_\_\_\_\_  
LaTonda Simmons  
City Clerk and Clerk of the Council  
of the City of Oakland, California

16  
ORA/COUNCIL  
JUL 19 2005

**STAFF:** WIB staff will screen out obviously non-responsive proposals prior to further review. Applicants for both RFPs whose conflict of interest responses are deemed non-responsive will be given an additional three days to cure flaws.



**FACILITATOR:** A professional knowledgeable about WIA issues will be chosen by the **WIB CHAIR** and **VICE-CHAIR**. The **FACILITATOR** will guide the proposal **READERS** in scoring applications in accordance with the scoring framework for each RFP.



**READERS:** The **FACILITATOR** will convene a three person panel of **READERS**, comprised of individuals from outside of Oakland with extensive WIA experience, and with no personal or professional stake in the outcome of the RFP process. If the volume of applications warrants, the **FACILITATOR** may elect to convene a separate panel of **READERS** for each RFP. The **READERS** will score each proposal per the RFP scoring framework. The top three applications for each RFP will proceed to the **INTERVIEW PANEL**; should an additional one or two proposals be scored closely with the top three, the **READERS** may elect to forward up to five applications to the **INTERVIEW PANEL**.



**INTERVIEW PANEL:** A body comprised of the three **READERS** and the **WIB CHAIR** and **VICE-CHAIR** will invite the top applicants to present their proposals and participate in an interview. Each applicant will answer the same interview questions. The **FACILITATOR** and **STAFF** will participate in the interviews, but will not score or vote on the interview results. Interviews will take place in a closed session. The **INTERVIEW PANEL** will score all finalists and present their scores for each RFP in ranked order to the **EXECUTIVE COMMITTEE**.



**EXECUTIVE COMMITTEE:** The WIB **EXECUTIVE COMMITTEE** will receive the recommendations of the **INTERVIEW PANEL**, and will recommend an awardee and an alternate for each RFP. The **EXECUTIVE COMMITTEE** recommendation will go forward to the **FULL WIB**.



**FULL WIB:** The WIB will convene to confer final approval on the awardee(s) as recommended by the **EXECUTIVE COMMITTEE**.

**System Administrator Proposal Summaries**

Applicant	Corporate HQ	Amount Requested	Staffing level	Voluntary Match Offered	Profit Included in Budget	Partners
<b>Oakland Private Industry Council</b> (non-profit)	Oakland, CA	\$1.3 million	• 19.68 FTE primary	• Each Year: \$195,000 match (15%)	none	None
			(blank)			
			• TOTAL 19.68 FTE	• TOTAL \$585,000 (15%)		
<b>TTI America</b> (for-profit; now including Arbor E&T, acquired 12/04)	Van Nuys, CA and Media, PA	\$1.15 million	• 9 FTE primary	• Each year: \$98,750 match (8.6%); plus fee-for-service options up to \$100,000; plus savings through training providers up to \$112,000	10%	Pyramid Business Systems, Oakland CA (tech services); and Patel and Asso, Oakland CA (accounting)
			• 1.81 FTE mgt support			
			• 3 FTE subcontractors			
			• TOTAL 13.81 FTE	• TOTAL \$296,250 (8.6%) direct match; plus fee generation and savings offered		
<b>Primus Group Consulting</b> (for-profit subsidiary of non-profit Fresno Area Workforce Investment Corp.)	Fresno, CA	\$1.25 million	• 8 FTE primary (local hires through subcontractor)	None quantified ("will leverage funds").	10%	Policy Innovation Works, Inc, Oakland CA (local management, 8 positions)
			• 1 FTE (10% of 10 staff) mgt support			
			• TOTAL 9 FTE			



Center Operator Proposal Summaries

Applicant	Corporate HQ	Service Levels in 05-06 (\$ is fixed)	Staffing level*	Match Offered (Voluntary Year 1, Mandatory Years 2-3)	Profit Included in Budget	Partners
Oakland Private Industry Council (non-profit)	Oakland, CA	360 A+DW	• 28.32 FTE by primary vendor	• Year 1 \$345,000 (15%)	none	Unity Council, Lao Family, Allen Temple HEDC, RTTC; Affiliates and Satellites
				• Year 2 \$345,000 (15%)		
				• Year 3 \$345,000 (15%)		
				• TOTAL \$1,035,000 (15%)		
ACS State and Local Solutions (for-profit; subsidiary of Affiliated Computer Services, Inc., also for-profit)	Austin, TX (parent in Washington, DC)	1,006 A+DW	• 20 FTE by primary vendor	• Year 1 \$138,000 (6%)	10%	Hispanic Chamber of Alameda County, YWCA of Oakland (both direct services thru One-Stops; HCCAC also job dev't)
				• Year 2 \$230,000 (10%)		
				• Year 3 \$230,000 (10%)		
				• TOTAL \$598,000 (8.6%)		

\* Staffing totals do not include proposed subcontractors



Center Operator Applicant Scoring Detail

Criteria and points approved by WIB			PIC			ACS		
			Rdr 1	Rdr 2	Rdr 3	Rdr 1	Rdr 2	Rdr 3
<b>1.</b>	<b>1. Organizational Capacity:</b>	<b>up to 35 points</b>	35	34	31	33	28	22
1a.	Experience in Workforce Development and related fields	15	15	15	14	15	14	13
1b.	Experience operating comparable programs in the City of Oakland, and demonstrated competency with a linguistically, ethnically, culturally and geographically diverse population like Oakland's	10	10	10	9	8	5	3
1c.	References	5	5	5	4	5	5	4
1d.	Organizational chart and staff qualifications	5	5	4	4	5	4	2
1e.	Single Audit and Legal Standing	Pass/Fail	P	P	P	P	P	P
<b>2.</b>	<b>2. Service Delivery Plan:</b>	<b>up to 45 points</b>	38	34	31	35	37	33
2a.	Universal Service Plan: Approach and priorities	10	8	9	7	9	9	7
2b.	Intensive Service Plan: Approach, priorities, levels of service, and performance goals	15	13	9	10	12	12	15
2c.	Building collaborations with One-Stop partners	10	9	8	9	6	7	5
2d.	Job development plan and ability to build business services relationships	10	8	8	5	8	9	6
<b>3.</b>	<b>Budget Detail and Value:</b>	<b>up to 20 points</b>	13	15	15	15	19	14
3a.	Plan for obtaining matching contributions of at least 5% of the contract value in Year 2, and at least 10% of the contract value in Year 3.	5	5	5	5	4	5	2
3b.	Strength and value of the budget proposal, including the plan for serving increasing numbers of clients for the funds allocated, while maintaining service quality and serving WIB-priority clients facing particularly high barriers to employment.	15	8	10	10	11	14	12
3c.	Reasonable profit, overhead, and/or indirect cost rates	Pass/Fail	P	P	P	P	P	P
<b>Possible Bonus Points</b>								
	Additional points available for significant voluntary matching fund contributions in Year 1 of the contract	Up to 5 bonus points	4	5	5	3	3	2
Total raw score:			90	88	82	86	87	71
			Raw Avg Score: 86.7			Raw Avg Score: 81.3		
Additional preference points per the City of Oakland's Local/Small Local Business Enterprise program goals			Up to 5 bonus points			City L/SLBE: 2		
			City L/SLBE: 3			City L/SLBE: 2		
			Adj. Raw Score: 89.7			Adj. Raw Score: 83.3		

**EXCERPTS FROM APPLICATIONS SUBMITTED IN RESPONSE TO  
THE OAKLAND WIB'S REQUESTS FOR PROPOSALS,  
January 2005**

**I. System Administrator Application from the Oakland Private Industry Council, Inc.**

The following are the Executive Summary and Budget Narrative sections of the application for the WIB's System Administrator role as submitted by the Oakland PIC:

**1 Executive Summary**

Building upon its highly successful experience and a dynamic vision for a 21<sup>st</sup> century workforce system for the City of Oakland, this proposal details the Oakland PIC's plans to further elevate Oakland One-Stop System Administrator performance in realization of the Oakland Workforce Investment Board's key goals and objectives. With the Oakland PIC's skilled workforce and excellent systems already in place, the Oakland PIC is ready to partner with the WIB to take these programs to another level of performance with few transition costs.

The Oakland PIC seeks to serve as the WIB's essential partner in effectively developing, managing, and monitoring WIA-funded programs in the City of Oakland by:

- ✓ Building **economies of scale** through efficient use of workforce system resources;
- ✓ **Leveraging additional resources** for the workforce system through the aggressive development of additional in-kind and financial partnerships;
- ✓ **Creating additional capacity** to reach underserved populations and geographic areas within the City of Oakland by deepening existing partnerships and building new ones; and
- ✓ Supporting the WIB in the development of a unified and **recognized Oakland Workforce brand**.

*The Oakland PIC proposes an ambitious coordination and standardization plan to ensure that all One-Stop contract holders are meeting state and local performance objectives, communicating effectively, and working collaboratively. The Oakland PIC will engage the One-Stop Career Center Operator and other partners in an effort to **expand service areas** and **develop new delivery methods**, targeting the hardest-to-reach and serve (especially far East and far West Oakland), as well as ensuring high quality services for employer partners.*

**Key Features of the PIC System Administrator Proposal**

In order to expand the impact and results of the One-Stop System Administrator service delivery model, the Oakland PIC will:

- ✓ **Triple** resource allocation to affiliates from current levels and increase service levels by 45%, resulting in lower average per client costs;
- ✓ Develop enhanced online technical assistance tools for system partners;
- ✓ Aggressively implement a systematic plan for annual resource development and provide a minimum of 15% matching funds to the Oakland WIB investment;
- ✓ Specifically target ex-offender and youth populations through expanded partnerships and the hiring of a One-Stop youth liaison;

- ✓ Participate in a WIB/ Oakland One-Stop workforce branding campaign;
- ✓ Provide strong firewalls between System Administrator and Operator functions while building significant economies of scale; and
- ✓ Engage WIB staff in new partner outreach, the selection of new subcontractors, and partner evaluation, including partner site visits.

### Major Partners

As illustrated by Table 1, the proposed plan involves extensive development of close partnerships with outstanding Oakland-based partners with proven track records.

System Administrator Collaborative Partners	
Oakland Private Industry Council	Oakland Downtown One-Stop Career Center Operator
Employment Development Department	Oakland One-Stop Career Center East
Lao Family Community Development, Inc.	Contract Youth Service Provider and Affiliate One-Stop
Merritt College One-Stop	Affiliate One-Stop
Scotlan Youth and Family Center	Contract Youth Service Provider
Spanish Speaking Citizens' Foundation	Contract Youth Service Provider
The English Center One-Stop Career Center	Affiliate One-Stop
Ultimate Staffing	Business Services Vendor
Unity Council One-Stop Career Center	Affiliate One-Stop
Youth Employment Partnership	Contract Youth Service Provider
Regional Technical Training Center	Proposed Satellite Career Center Operator
Allen Temple Housing & Economic Development Corporation	Proposed Satellite Career Center Operator

### Performance Results

Grounded in its commitment to building a first-class workforce development system, Table 2 below highlights the specific performance results to be realized by the Oakland PIC proposal.

Oakland PIC System Administrator Performance Results	
Lower per client costs	31% reduction in average per client costs by Year 3
Expanded geographic area coverage	28% of all intensive adult clients will be served by neighborhood-based affiliate sites in Year 1 and affiliate sites will see a 200% rise in resource allocations targeting satellite partners in far East and far West Oakland
Higher enrollment among adults and dislocated workers, reflecting increasing needs in the local area.	20% increase in Year 1 over adult 2004-5 numbers; 10% increase in Years 2 and 3, respectively

## Budget Detail & Efficiencies

### 1.A. WIA Fiscal Systems Aptitude

The Oakland PIC has held primary fiscal responsibility for administering federally-funded Workforce Investment Act (WIA) and Job Training Partnership Act (JTPA) programs in Oakland for the last 12 years. During that time, the Oakland PIC has systematically conducted timely and accurate fiscal reporting in accordance with local, state, and federal guidelines. The Oakland PIC has also established and maintained an excellent working relationship with the State Workforce Investment Division's Financial Management Unit, and has completed all fiscal monitoring and numerous audits without any unresolved findings or questioned costs.

In terms of system efficiencies, the Oakland PIC realizes considerable cost savings and maximizes the investment of WIA resources by simultaneously serving as the System Administrator and System Operator for the Oakland WIB. Savings and efficiencies result from:

1) **Shared Office Space & Equipment:** Many System Administrator and Operator staff share

office space and the Oakland PIC is able to minimize rent and equipment expenditures as a result.

2) **Absorption of Startup Costs:** The Oakland PIC has already absorbed the startup costs

involved in setting up and launching the One-Stop system. Such costs include the

purchase/leasing of office space and equipment, hiring of staff, and the installation,

configuration, and implementation of computer and technology systems to administer the

various One-Stop programs.

3) **Training Costs:** Oakland PIC staff are already trained and in place. The costs involved in

training new staff, as well as the lag time in implementation of new programs while new staff

is brought up to speed, are significant. For example, the Oakland PIC estimates that its staff

costs during the first 3-6 months when it first initiated Systems Administration and One-Stop

Center operations (when staff were first hired and brought up to speed), ranged between

\$285,000 and \$570,000. These costs have already been absorbed by a staff that is fully

trained and in place.

4) **Leveraged Funding and Partnerships:** The Oakland PIC has established relationships with

numerous local, state, and national funders and has raised over **\$18 Million** (see Attachment

D, page 200) to support Oakland One-Stop programs since 1997. The PIC has worked with over 25 service providers in administering the One-Stop system and has systems in place for managing these partnerships. The resource costs involved in establishing these funder and partner relationships, and for establishing an effective partner management system, are considerable.

### **New Plans for Cost Savings and Reaching Efficiencies Among Service Providers**

Moving forward, the Oakland PIC plans to increase the number of intensive adult and dislocated worker clients served, while reducing average cost-per-placement. This will result in significant cost savings to the system. These savings will be accomplished by increasing the number of adult clients served at affiliate sites (with a current \$1,824 direct service cost-per-placement rate), and decreasing the per client costs of adult clients served at the downtown One-Stop. At present, the Oakland PIC serves 300 adult and dislocated worker clients per year. During the next three years, the PIC expects to increase adult intensive service clients by 20% during the first year, and 10% per year in Years two and three. **This will result in a total increase of adult service clients from 300 to 436 (45%) by the end of the 2007-2008 WIA service year.**

The Oakland PIC will simultaneously raise the number of adult intensive service clients served by affiliate sites from the current level of 20% to 28%, resulting in an increase from 60 individuals served in 2004-2005 to 100 individuals served by affiliate sites in 2007-2008. This will result in an average annual per client cost savings over 3 years of \$1,843 per year - effectively allowing the Oakland PIC to serve 292 (32%) more adult and dislocated worker clients with the same amount of funding over 3 years. **By Year 3 of the contract, the Oakland PIC will have realized a 31% cost savings per adult client (see Table 11 below).**

<b>Oakland PIC Service Levels: Adult and Dislocated Worker Enrollments - 2004/5 through 2007/8</b>				
<b>Year</b>	<b>2004-2005</b>	<b>2005-2006</b>	<b>2006-2007</b>	<b>2007-2008</b>
<b>Comprehensive Center (Including ASSETS)</b>	240	260	296	336
<b>Affiliate</b>	60	100	100	100
<b>Average Per Client Cost*</b>	\$7,667	\$6,389	\$5,808	\$5,275
<b>Average Per Client Cost Savings over 2004/5 (%)</b>	n/a	\$1,278	\$1,859	\$2,391
<b>Average Per Client Cost Savings over 2004/5 (%)</b>	n/a	17%	24%	31%

Finally, while there is no direct impact on the System Administrator Budget, it is important to note here that the Operator will be decreasing its allocation to allow the current affiliate site allocations to rise from the current \$210,000 level to \$625,000 to help support greater numbers of universal clients, as well as the increase in enrolled clients expected to be served by affiliate sites under the new configuration outlined above. The Oakland PIC believes that this re-allocation is necessary to meet efficiency goals for service providers.

### **1.B. Budget Overview**

The proposed \$1.3 Million Oakland PIC budget is a highly cost-effective approach to administering the Oakland One-Stop System Administrator contract. The budget reflects a 0% increase in the current 2004-2005 Oakland PIC System Administrator budget. The attached budget worksheets (see page 62) provide a breakdown of major expenditures, including personnel (\$1,060,469) and non-personnel costs (\$239,531). All personnel and non-personnel costs in the proposed 2005-2006 budget represent historical costs taken from the Oakland PIC's 2004-2005 budget. The Oakland PIC does not charge any management fees or generate profit through its activities.

The attached personnel worksheet (see pages 63-4) includes information on 28.5 FTE staff positions that will provide System Administration services. All of these positions are essential for the effective operation of the One-Stop System and the management and monitoring of partner programs and contracts. In order to minimize costs and maximize efficiencies, staff positions listed in this proposal are partially funded through the System Administrator grant and partially through the Career Center Operator grant. Many of the functions of staff under either grant are more efficiently funded if staff share responsibilities and take on multiple roles. For example, the accounting manager can most efficiently monitor accounts for both grants simultaneously, whereas hiring two accounting managers – one for System Administrator and one for Operator – would be much less cost effective.

### **1.C. Leveraging Non-WIA Resources**

Since 1997, the Oakland PIC has helped to raise over \$18 Million to support Oakland One-Stop and workforce development programs. Over the last three years, the PIC has raised over three million dollars in non-WIA resources to support critical workforce development programs and enhance the operations of the Oakland One-Stop career system (see Table 12 below).

As part of its effort to leverage additional funding, the PIC has developed solid relationships with funders at both the federal and local level. The PIC has also collaborated with a variety of local, statewide, and national partners to develop the kinds of highly innovative program concepts and collaborative partnerships necessary to be competitive for these types of resources. Building on these relationships and its solid track record of performance, the PIC is well positioned to pursue additional non-WIA funding in the years ahead.

Funds Leveraged for One-Stop Administration and Operations, 2002-2004					
Caregiver Training Initiative	State of California Gov. 25%	3/1/01-12/31/02	Cities of San Jose, Oakland, and Richmond, Contra Costa Co., Los Angeles Co., Central CA	\$2,690,000	\$588,909
Tech to Teachers	State of California Gov. 25%	4/1/02-6/30/05	Cities of Oakland and Richmond, and Contra Costa Co.	\$400,000	\$352,000
RE-TEC	State of California Gov. 15%	7/1/01-3/31/04	California Statewide	\$7,194,443	\$393,120
Nurse Workforce Initiative	State of California Gov. 25%	3/14/02 - 02/7/06	EASTBAY Works	\$800,000	\$168,000
Public Sector Initiative	State of California Gov. 25%	5/1/04-5/1/05	Cities of Oakland and Richmond, and Alameda Co.	\$865,000	\$230,000
H-1B Technical Skills Training Grant	U.S. Department of Labor	3/1/02-3/15/04	EASTBAY Works, Cypress-Mandela Technology Center	\$4,950,831	\$429,043
H-1B Technical Skills Training Grant	U.S. Department of Labor	1/30/01-1/30/03	EASTBAY Works, Cypress-Mandela Technology Center	\$2,900,000	\$375,845
H-1B Technical Skills Training Grant	U.S. Department of Labor	7/1/00-3/27/02	Prince George Academy, Maryland	NA	\$62,000
County of San Mateo-Airport Project	State of CA Gov. 25%	9/1/03-6/30/04	County of San Mateo	\$305,000	\$155,000
Regional Incentive Award	State of CA WIA 15%	7/12/02-6/30/05	EASTBAY Works	\$100,000	\$32,000
Cypress Mandela/WIST Training Center	State of CA Gov. 15%	6/30/02-6/30/04	Alameda County	\$900,000	\$389,721
National Emergency Grant	State of CA 25%	12/15/04 - 12/31/05	Alameda County, Richmond, CC County	\$204,400	\$63,364
Regional Incentive Award	State of California	10/1/04-12/31-05	EASTBAY Works	\$70,000	\$22,750

	WIA 15%				
<b>Total Non-WIA Resources Developed by the Oakland PIC for One-Stop Administration and Operations</b>					\$3,232,002

### **New Plans for Leveraging Non-WIA Funds**

Building on the exceptional results that it has achieved to date, the Oakland PIC will further develop its capacity to leverage non-WIA funds and proposes to:

- 1) **Commit a minimum of 15% in matching resources, totaling \$195,000 and including both cash and in-kind support, to sustain the One-Stop System Administration contract.** An example of these types of resources would include the Cypress Mandela/Women in Skilled Trades (WIST) Pre-apprenticeship Training programs. The funds support high-demand construction job training programs, which provide significant added value to the Oakland One-Stop workforce system.
- 2) **Develop and implement a systematic plan for resource development with specific, annual goals.** Annual funding targets for cash resources will be set at 10% of the total received in formula funds (or \$130,000 for FY 2005-06) per year, through the duration of the contract. Additional efforts will be made to secure long-term funding for One-Stop Administration and Operator costs, extending well beyond the contract period. A development consultant, with significant expertise in leveraging non-WIA resources, will be retained to assist with ongoing resource development efforts.
- 3) **Launch a rigorous campaign to increase financial and in-kind support from mandated and voluntary partners,** and the private sector. Each new contracted partner will be requested to match a minimum of 15% of their contracted amounts in financial or in-kind support. This effort will include outreach to new partners who can both enhance the quality of the system and offer resources that build its ongoing sustainability.



<b>OAKLAND WIB SYSTEM ADMINISTRATOR BUDGET PROPOSAL, FY 2005 - 06</b>		
<b>Ref #</b>	<b>CATEGORY</b>	<b>AMOUNT</b>
	<b><u>Personnel Costs</u></b>	
1	Staff Salaries+Taxes	\$965,875
2	Benefits	\$94,594
3	<b>Total Personnel Costs</b> (must match total from personnel breakdown worksheet)	\$1,060,469
	<b><u>Non-personnel Costs</u></b>	
4	Rent	\$122,065
	• estimated or actual square footage-allocated	6,091 Sq.Ft.
	• estimated or actual cost per square foot	\$1.67 Per Sq.Ft./mo.
5	Insurance	\$10,488
6	Equipment	\$20,276
7	Supplies	\$19,950
8	Printing, Copying and Materials	\$24,042
9	Staff travel and training	\$8,340
10	Consultant/contract services	\$22,116
11	Other miscellaneous operating expenses	\$12,255
12	<b>Total Non-Personnel Costs</b>	\$239,531
13	<b>Total Budget</b>	\$1,300,000

Staffing Breakdowns by Contract and by Service Type									
Position Title	Agency Dept.	Dollar Amount of Total Annual Salary+ Benefit cost	By Contracted Role for 2005-06		By Service Type 3				
			% of position charged to system administrator role	% of position charged to Center Operator Role					
Chief Executive Officer		\$102,687	65	35	65%	19%			16%
<b>Admin</b>									
Director	Admin	\$74,174	50	50	50%	50%			
Admin Support	Admin	\$40,635	62	38	35%	65%			
Admin Support	Admin	\$34,418	100				90%	5%	5%
Communication support	Admin	\$27,458	62	38		100%			
<b>Fiscal</b>									
Director	Fiscal	\$95,818	63	37	100%				
Manager, Accounting	Fiscal	\$71,663	63	37	100%				
Benefits/Payroll Manager	Fiscal	\$73,832	63	37	100%				
Accounts Payable Coordinator	Fiscal	\$49,847	63	37	100%				
Payroll Assistant	Fiscal	\$39,293	63	37	100%				
<b>Oakland One-Stop Career and Business Svcs (OOS)</b>									
Director	OOS	\$71,175		100			30%	70%	
<b>Career Counseling Services</b>									
Manager	OOS	\$57,671		100				100%	
Sr. Career Counselor	OOS	\$58,768		100			10%	90%	
Sr. Career Counselor	OOS	\$46,483		100			10%	90%	
Sr. Career Counselor	OOS	\$44,948		100			10%	90%	
Career Counselor	OOS	\$47,507		100			10%	90%	
Career Counselor	OOS	\$40,438		100			10%	90%	
Career Counselor	OOS	\$46,337		100			10%	90%	
Career Counselor Technician	OOS	\$38,147		100			10%	90%	



## **II. System Administrator Application from Primus Group Consulting, Inc.**

The following are the Executive Summary and Budget Narrative sections of the application for the WIB's System Administrator role as submitted by Primus Group Consulting:

### **Executive Summary**

Primus Group Consulting, Inc., a for-profit subsidiary of the Fresno Area Workforce Investment Corporation (FAWIC), is submitting a Proposal to provide One-Stop System Administrator services for the City of Oakland Workforce Investment Board. As the lead agency, Primus will provide contract management, program administration, program financial management, oversight of subcontractor and partner activities, facilitation of One-Stop system improvements, partner relationship expansion, and monitoring of operations and program performance for all Oakland WIA programs.

Primus will leverage off the Fresno County One-Stop Quality System Model, and facilitate strong team partner participation and sharing of resources. Implementation of this model is promoted through One-Stop system Partner and Contractor weekly meetings focused on Outcomes and Continuous Quality Improvement activities. Major outcomes that Fresno has attained through this process include One-Stop: Customer Flow design and implementation, System Partner Referral and Co-enrollment process, and Resource Sharing model. Other outcomes include the development of extremely strong relationships among all Staff, Contractors and Partners based on mutual trust, commitment to quality, managing WIA outcomes and open communications. Over the last three years, the FCWIB has continued to improve all mandated and local performance measures.

Primus will also meet with WIA contractors weekly to review performance, and other associated quality and system issues and facilitate the on-going meetings to ensure all

contractors are meeting local and mandated performance measures. Primus is a quality-driven organization. Primus staff will focus on four areas for continuous improvement: cost, quality, customer satisfaction, and efficiency. It is critical that all meetings focus on root cause analysis of why performance is not being met. It is important to note that there are occasions that a local WIB policy (or lack thereof), could impact Contractors' ability to meet certain WIA performance goals. Ex: The Fresno WIB did not have a local credential policy – therefore the contractors struggled to meet the Employment and Credential goal. Working collaboratively, the One-Stop team drafted a WIB policy to ensure that performance could and would be attained. The weekly meetings of Contractors (WIA) and Partners (One-Stop) reason for existence is to develop required policies and processes to ensure all performance will be met or exceeded. Primus will manage results, and will prepare monthly and quarterly reports for the Oakland WIB and its Councils. Any Contractor not meeting performance must develop a Corrective Action plan and timeline to resolve all performance issues.

Primus advocates that each Local WIB has complete responsibility in defining and directing all workforce activities in their local areas. To be effective, each WIB must develop a strong Vision, Mission, and Objectives in order to meet the local areas needs. As we have benchmarked many local WIBs across the nation, WIBs that struggle are those that have taken a laissez faire approach in the development and management of their One-Stop systems. Many WIBs contract out their One-Stop Services, stand back, and only review outcomes. More successful WIBs are constantly reviewing outcomes, proactively identifying the reasons for performance gaps, and developing policies, procedures, and work instructions for their contractors to ensure higher levels of success. These high performing WIBs believe it is their responsibility to ensure that the types, availability, and quality of services received across all

their One-Stop locations, for either businesses or job seekers must be consistent, regardless of the individual Service Provider. These high performing WIBs have developed the required foundation to build a strong quality system.

### **Budget Narrative**

The budget is presented with budget forms.

#### **A. Primus Budget**

1. Staff salaries – the amount of salary and benefits projected for the percentage of time allocated for Primus staff start-up and continuous technical support requirements.
2. Rent – projection based on the square footage and cost forecasted for Oakland office facilities.
3. Equipment – cost of computers, etc., for Oakland staff.
4. Office Supplies – the estimated amount of paper, pens, notebooks, etc., that project staff will require for the project.
5. Staff Travel – the cost for Primus to travel to Oakland to provide training and technical assistance to Primus staff, Partners and Contractors.
6. Consultant/Contract Services – Outside professional services budgeted for this project are as follows:
  - a) CMTi will provide access to I-Train for processing WIA participant payments, and other JTA/data management services. The amount budgeted includes access to the system via the Internet and programming required for the connection with the project.
  - b) Policy Innovations Works – Protégé-Mentor sub-contract for One-Stop Administrator and Program Management staff.

**B. Cost Allocation Plan – (Effective July 1, 2003)**

This cost allocation plan applies to all federal funds received by FAWIC/Primus. Federal regulations state that costs must be allocated to grants and cost categories based on the benefits received by the grant and cost category. FAWIC/Primus allocates costs directly to the grant or cost category whenever possible. Costs that cannot be identified with one grant or cost category are reviewed for appropriate cost allocation. This may be based on direct expenditures, direct labor hours, or another method depending on the type of cost and benefiting grants.

The following describes the cost allocation methods for costs that cannot be specifically identified with a grant.

**C. FAWIC/Primus Agency Expenditures**

The FAWIC/Primus develops an agency budget each year. The budget is approved by the FAWIC/Primus Board of Directors. The costs for this budget are allocated to the grants as follows.

**1. Salaries and Fringe Benefits**

Salaries and fringe benefits of FAWIC/Primus staff are allocated to the grants based on direct labor hours. Direct labor hours are determined from electronic timesheets maintained by staff and approved by their supervisor. The number of hours spent on each grant is recorded on the electronic timesheet. Some positions are authorized to use a cost pool to allocate some of their time. The pools for these positions are authorized for the staff person in the electronic timesheet program. The pools are then allocated to the grants based on direct labor hours.

The hours are entered into the payroll system by grant. The pooled hours are recorded in the payroll system in the various cost pools. The payroll system calculates the salaries and related expenses by employee and records the amount in each grant. The amount for the pooled time is recorded in the various cost pools for allocation with the operating expenses.

2. Operating Expenses and Cost Pool Time Allocations

Costs are allocated directly to a grant whenever possible. Costs that cannot be identified with a particular grant are recorded in the appropriate cost pool. The pools also contain the staff salaries and fringe benefits recorded through electronic timesheet input. *The costs in the pool are allocated to the grants based on direct labor hours.*

**2 D. Cost Pools and Allocation**

1. Administrative Pool – This pool consists of administration expenditures that are not identified with a specific grant. The pool is allocated to the administration cost category by grant.
2. General Pool – This pool consists of expenditures that can be program or administration such as rent, utilities, etc. The pool is allocated to the administration and program cost categories by grant.



**OAKLAND WIB SYSTEM ADMINISTRATOR BUDGET  
PROPOSAL  
FY 2005-2006**

Ref	CATEGORY	AMOUNT
	<b>Personnel Costs</b>	
1	Staff Salaries + Taxes	373,007
2	Benefits	150,658
3	<b>Total Personnel Costs</b> (must match total from personnel breakdown worksheet)	523,665
	<b>Non-personnel Costs</b>	
4	Rent	85,000 *
	Estimated or actual square footage	1,000
	Estimated or actual cost per square foot	\$7.08
5	Insurance	15,000
6	Equipment	25,000
7	Supplies	12,500
8	Printing, copying and materials	12,500
9	Staff travel and training	75,000
10	Consultant/contract services	345,506 ***
11	Other miscellaneous operating expenses	155,828 **
12	<b>Total Non-Personnel Costs</b>	726,334
13	<b>Total Budget</b>	<b>1,249,999</b>

\*Includes utilities, communications, maintenance, etc.

\*\* Includes profit @ 10% of expenditures

\*\*\*This amount includes staffing for Policy Innovations and technology services for electronic customer payments

**16**  
**ORACOUNCIL**  
**JUL 19 2005**



### **III. System Administrator Application from TTI America/Arbor E&T, Inc.**

The following are the Executive Summary and Budget Narrative sections of the application for the WIB's System Administrator role as submitted by TTI America/Arbor E&T, a recently merged corporation:

#### **a. Executive Summary**

Our understanding of the role envisioned for the System Administrator is based on 11 years experience managing One-Stop Centers and delivering services in a One-Stop environment, as well as 36 years experience serving local, State, and Federal government funding sources. TTI America will assume *responsibility* and *accountability* to the Oakland WIB for the following:

- **Proper execution of contracts with the providers of all WIA services in accordance with the policy and budget directives of the Oakland WIB** by negotiating terms agreeable to the WIB and Partners and building a Performance Monitoring Tool into the contract's Scope of Work to ensure all terms are met.
- **Monitoring the compliance and performance of all service providers** through reliance on our Continuous Quality Improvement process and technical assistance, as well as a subcontracting agreement with Patel & Associates to perform independent monitoring of the performance and compliance of all service providers, including TTI America.
- **Establish and maintain the technological systems necessary for performance reporting** through a subcontract agreement with Pyramid Business Services to adapt TTI America's versatile TRACKER System to the existing Smartware performance tracking system and provide ongoing system maintenance.
- **Oversee the fiscal systems and reporting for WIA funds** through a subcontract with Patel & Associates to perform fiscal auditing and compliance monitoring of the TTI America's

Accounting Department's management of WIA funds. TTI America will comply with all Oakland WIB reporting requirements, including reporting for WIA funds.

- **Create and maintain effective partnerships with the network of agencies that comprise the mandated and voluntary partners of the Oakland One-Stop System** by facilitating communication among partner agencies.
- **Create and maintain an effective partnership with the WIB's Business Services vendor** by supporting the Business Services vendor in every way possible, including attending employer forums and assisting them to develop an Employer Advisory Committee similar to the model we have developed in San Diego.
- **Develop the collaborations necessary to effectively deliver services through all partners** by functioning as Scout, Broker, and Facilitator to the WIB and the One-Stop System.

As System Administrator, we will follow established procurement rules and negotiate contract terms that are clearly spelled out and goals that are realistic and achievable. We will develop a monitoring tool that ensures providers are meeting their performance; we will also develop a Corrective Action Plan with providers, if necessary. We are Subject Matter Experts: we'll assist all partners when and where we can. We understand that *their* success is *our* success.

Our proposed budget of \$1.148M. provides the necessary funds to perform the System Administrator services as proposed, at a cost savings of 14% from the PY 04-05 total of approximately \$1.335M.. We plan to act as a collaborative partner with the WIB, One-Stop Operator, and the partners/providers in the system. Our success in this capacity has largely relied on clear and frequent communication, and by involving all stakeholders in such activities as Strategic Planning, Continuous Quality Improvement, and monthly Operations and quarterly

Executive Committee meetings. Our office in Oakland will be located at 416 14<sup>th</sup> Street in Oakland, near the WIB offices.

**b. Budget Narrative**

**Personnel Costs**

Staff Salaries: 9 full-time, on-site staff – to be recruited and hired locally - will be dedicated to the project @ 100% each = 9.0 FTE. In addition, on-site staff are supplemented by support from various ARBOR corporate office professionals, organized into “teams”, that provide expertise in the areas of operations and finance. The *Operations Team* is responsible for: program start-up, program oversight, contract monitoring, staff training and technical assistance, liaison with the funding source, etc. The Operations Manager for this program (a member of the Operations Team) will be Ruben Pacheco. The *Finance Team* is responsible for: oversight of financial expenditures and receipts, processing of invoices and supporting documentation, review of expenditures versus budget, processing of staff payroll, maintenance of personnel benefits, etc. Individual staff time is tracked and recorded on timesheets by hour, contract, and cost category. Funding sources are billed only for time worked on their specific contract(s). The Finance Team is headed by Dan Brice, CPA, Controller.

Benefits: Fringe benefits @ 21.5 % of Salaries: FICA 7.65%, Health Insurance 5.01%, Worker’s Compensation 3.87%, SUI/FUTA 1.29%, 401K 0.62%, Other (corp. vac./sick/hol.) 3.06%.

**Non-personnel Costs**

Rent: Office space located at 436 14<sup>th</sup> Street, 10<sup>th</sup> and 11<sup>th</sup> floor, Oakland. Calculated at 2,000 square feet X \$1.65 per square foot X 12 months

Insurance: umbrella coverage (certificate in Required Attachments) @ 7.56 per 1K of contract.

Equipment: Lease or purchase of computer equipment and printers, fax, copy machine, and cellular telephones

Supplies: Consumable supplies associated with the workplace.

Printing, Copying, and Materials: Costs associated with production of the Oakland One-Stop System newsletter and other System promotional materials; stationery with appropriate letterhead and business cards.

Staff travel and training: Local travel:  $.37/\text{mi.} \times 500\text{mis./mo.} \times 12 = 2,220$ ; travel from corporate and regional offices in Media, PA and Van Nuys, CA:  $450\text{ ave./trip} \times 10 = 4,500$ ; staff training seminars and workshops @  $400 \times 9\text{ staff} = 3,600$ .

Consultant/contract services: Covers the cost of TTI America's two proposed subcontractors, both of whom are small local business enterprises (SLBEs):

Patel & Associates, CPA: independent performance and contract compliance monitoring and fiscal auditing:  $\$120,000 = 10.5\%$

Pyramid Business Services: establish and maintain technological systems necessary for performance reporting:  $\$120,000 = 10.5\%$

Other miscellaneous operating expenses:

Telephone: local, long distance, and Internet connections @  $500/\text{mo.} \times 12 = 6,000$

Postage: including overnight deliveries @  $150/\text{mo.} \times 12 = 1,800$

Audit: @  $0.25\%$  contract = 2,847

Central Office Shared Costs\*: @  $6.5\%$  total costs excluding fee = 63,703

Fee\*: @  $10\%$  all other costs + 104,374

Total "Other": 178,724 \*Please see attached Cost Allocation Plan for details.

Quantify the monetary value of any voluntary matching or value-adding resources offered by the applicant to the benefit of the Oakland WIB and its clients.

Our proposal includes the following as non-cash, in-kind contributions.

- TTI America's commitment to transitional and ongoing project support by the assignment of senior management, professional services, and key staff. Projected costs: **\$90,000.**
- Dr. Paul Miller will provide 80 hours over the duration of the contract to deliver staff and Partner training in the Continuous Quality Improvement process; Dr. Miller will also evaluate and advise staff regarding CQI process information gathering and analysis: **\$4,000**
- TRACKER System proprietary electronic tracking system software: **\$250**
- Marcos Serpas will provide 80 hours during transition and first month of the contract to provide integration of TRACKER with the Oakland One-Stop System's current Case Management software, and provide staff training on use of TRACKER system: **\$4,500**

In addition, TTI America is committed to identifying and using, whenever possible, non-WIA-funded training solutions in all of our projects; this practice represents a considerable benefit to our funding sources throughout our organization. For example, in our Van Nuys WorkSource Center, from July 1 to November 30, 2004, our use of non-WIA training providers saved the City of Los Angeles **\$112,000**. As Systems Administrator, we will work with the Center Operator to train appropriate management and staff to follow this practice and provide the same benefit to the Oakland WIB.

Our proposal also includes the following potential cash match opportunities, provided they are approved by the Oakland WIB:

- TTI America Fee-for-Service Menu: upon Board approval, we will offer the services the fees for which we estimate to be approximately **\$100,000**

**TTI America's success in maintaining a low cost per client served while providing high quality services involves a three-step process that involves goal setting, performance monitoring, and data collection and analysis through our CQI process. First, during contract negotiations we will establish reasonable and achievable performance goals for each Center that we will break down into individual section, partner, or staff goals; we will ensure that all partners and staff are aware of those goals and their performance against them on no less than a monthly basis.**

**Second, our Performance Manager will monitor performance against goals and will conduct monthly performance meetings to discuss with the operator, staff, and partners where performance is meeting goal and where it is not. The work of the Performance Manager will ensure that everyone understands how their individual performance against their goals affects the Center's performance as a whole.**

**Third, all collected performance data, along with customer satisfaction and other relevant data, will be submitted to the Center's Continuous Quality Improvement process to ensure that we effect change in order to meet and surpass goals, as well as maintain a high level of quality in the services we provide.**

As an example, the table below demonstrates our success in maintaining a low cost associated with placing customers at just two of our One-Stop Centers; we are certain that in implementing our above-described process, we will bring down the cost per client in Oakland to comparable amounts.



**Cost-per-placement Comparison**

	<b>Oakland Comprehensive One-Stop Centers</b>	<b>TTI America Canoga Park/West Hills WorkSource Center</b>	<b>TTI America South County Career Center, San Diego</b>
<b>Average cost-per-placement (Adult and Dislocated Worker)</b>	<b>\$10,916</b>	<b>\$2,900</b>	<b>\$2,745</b>

In addition, we are attaching sample management reports from our City of Los Angeles and County of San Diego One-Stop projects that demonstrate how closely we track our performance to ensure that performance goals are made. Please see the Management Reports tab.

#### **IV. Center Operator Application from the Oakland Private Industry Council, Inc.**

The following are the Executive Summary and Budget Narrative sections of the application for the WIB's Center Operator role as submitted by the Oakland PIC:

##### **Executive Summary**

The Oakland Private Industry Council, Inc. (Oakland PIC) proposes to expand on the strong foundation it has built for One-Stop services in the City of Oakland and establish an independent division, Oakland One-Stop Career and Business Services (OOS), to act as the Oakland One-Stop Career Center Operator. OOS will be fully empowered to make all programmatic and policy decisions in relation to the development and operation of the One-Stop system. If desired by the Oakland Workforce Investment Board (Oakland WIB), OOS will become a separately incorporated non-profit organization.

OOS proposes to combine the best knowledge and practices obtained during the Oakland PIC's successful operation of One-Stop Career Centers with bold new initiatives, taking workforce development to a new level of effectiveness in the City of Oakland. OOS will build upon the existing team of management and front-line service personnel, who have the demonstrated experience and understanding to fulfill the Oakland WIB's mandate of providing effective services to businesses and job seekers, particularly those who are most underserved and most in need of work.

OOS will maintain and continue to develop the two full-service and four Affiliate One-Stop Career Centers at their current locations. OOS will, in cooperation with WIA youth services providers, establish a special Youth Career Center inside the 1212 Broadway full-service location to improve youth access to WIA resources and services. OOS will draw upon best practices in the field of youth development to guarantee strong ownership and participation by youth.

Quality services for Oakland's businesses, workers, and job seekers will be increased by OOS' proposed allocation of an additional \$350,000 per year to two Affiliate One-Stop Centers: \$225,000 for the Spanish Speaking Unity Council, and \$125,000 for Lao Family Community Development, Inc. At the same time, OOS will develop new partnerships with local organizations by establishing Satellite Career Centers to continue the geographic and programmatic expansion of the Career Center network. Two new Career Center Satellite Sites are ready to serve far East and far West Oakland: Allen Temple Housing and Economic Development Corporation and the Regional Technical Training Center. Each has a distinguished record of serving its local community and will receive \$25,000 annually to provide services to Oakland's most isolated neighborhoods. In total, OOS will reallocate \$400,000 annually from the existing One-Stop budget to increase the geographic coverage and programmatic capacity of the One-Stop Career Centers.

OOS is committed to maintaining a close working relationship with the Oakland Workforce Investment Board (WIB) and its subcommittees, WIB staff, and the System Administrator. OOS will seek their regular, in-depth participation in the development of collaborative responses to challenges experienced by the One-Stop Career Centers as they provide services to Oakland's workforce communities.

OOS commits to providing a minimum of 15% in matching funds (\$345,000) annually for One-Stop Career Center Operations. To achieve this, OOS will incorporate more private sector partners and resources into operations at Career Centers; initiate collaborative resource development with all mandated and community partners; and contract with external grant and contract development experts to develop at least four major workforce development funding proposals per year. These efforts will further augment the valuable contributions of existing partners.

The OOS and its distinguished staff are the repository of valuable, hard-earned knowledge, skills, and capacity — an invaluable and irreplaceable resource for providing high-quality workforce development services for the City of Oakland. This proposal provides multiple mechanisms for the Oakland PIC and the Oakland WIB to build upon this strong foundation. As partners, they can further expand a model workforce system, one that nurtures and identifies job opportunities for all of its citizens, stopping at nothing to put people to work. The net result will be that Oakland businesses, job, and education seekers will be aware of, and will consistently access, the high quality resources and services provided via Oakland's cutting edge workforce development system.

## **2.A. Infrastructure Investments are Complete: Savings Realized from Dual Role**

Oakland One-Stop Career and Business Services (OOS) through its parent organization, the Oakland PIC, has been primarily responsible for fiscal administration of federally-funded Workforce Investment Act (WIA) and Job Training Partnership Act (JTPA) programs in Oakland during the last 12 years. During that time, the OOS has systematically conducted timely and accurate fiscal reporting in accordance with local, state, and federal guidelines. OOS has also established and maintained an excellent working relationship with the State Workforce Investment Division's Financial Management Unit, and has completed all fiscal monitoring and numerous audits without any unresolved findings or questioned costs.

The Oakland PIC realizes considerable cost savings and maximizes the investment of WIA resources by simultaneously serving as fiscal agent for the System Administrator and System Operator under contract to the Oakland WIB. These savings and efficiencies will directly benefit OOS as the One-Stop Career Center Operator in the following ways:

### **Shared Office Space & Equipment:**

Many System Administrator and Operator staff share office space and the Oakland PIC, as fiscal agent, is able to minimize rent and equipment expenditures as a result.

### **Absorption of Startup Costs:**

The Oakland PIC, as fiscal agent, has already absorbed the startup costs involved in setting up and launching OOS Operations. Such costs include the purchase/leasing of office space and equipment, hiring of staff, and the installation, configuration, and implementation of computer and technology systems to administer the various One-Stop programs.

### **Training Costs:**

OOS staff have been carefully recruited, cross-trained, and are presently serving Oakland's workforce communities with great success. The costs involved in recruiting, screening, and thoroughly cross-training new staff, as well as the lag time in implementation of services while

new staff are becoming oriented to a demanding work environment, are significant. For example, the Oakland PIC, as fiscal agent, estimates that staff costs during the first 3-6 months of operations (when Systems Administration and One-Stop Center operations were initiated, and when staff were first hired and brought up to speed), were approximately \$285,000. These costs have already been met through prior year's WIA expenditures, and will not have to be duplicated with OOS's fully trained staff in place.

### **Leveraged Funding and Partnerships:**

The Oakland PIC, as the parent organization for OOS, has established relationships with numerous local, state, and national funders and has raised over **\$18 Million** (see Attachment F) to support Oakland One-Stop programming since 1997. The PIC has worked effectively with over 25 service providers in administering the One-Stop system and has well-established systems in place for managing these partnerships. The resource costs involved in establishing these funder and partner relationships, and for establishing an effective partner management system, are considerable, and will not have to be duplicated by OOS as One-Stop Career Center Operator.

### **2.B. Proposal for Increased Efficiency and Increased Enrollments**

In the 2005-2008 contract period, OOS proposes to increase the number of enrolled (adult intensive and dislocated workers) clients served each year while reducing average cost-per-enrollment, which will result in a significant increase in efficiency in the provision of services for enrolled clients. Increased enrollments and reduced cost per enrolled client will be accomplished while maintaining the current level of overall spending for all client services at \$2,300,000 per year.

At present, OOS serves 300 enrolled clients per year, which includes 60 enrollments by 3 Affiliates and 240 enrollments by OOS's comprehensive centers at 1212 Broadway and 675 Hegenberger Road and the City of Oakland's Older Worker Intensive Services ASSETS program. During the next three years, OOS proposes to increase the overall number of enrolled clients served from 300 to 436. Increasing the numbers of enrolled clients served will be accomplished in two ways. First, Affiliate Sites will increase the number of enrolled client from 60/ year in 2004-2005 to 100/year for 2005-2006, through 2007 to 2008, a 67% increase in Affiliate enrollments. Secondly, the number of adult enrolled clients served by OOS' comprehensive centers at 1212 Broadway and 675 Hegenberger Road (and the City of Oakland ASSETS Program which provides services to older workers) will increase from 240 in 2004-2005 to 336 in 2007-2008. This will result in a 45% increase in the number of enrolled clients served by Oakland's One-Stop Career Centers at the end of the 2007-2008 contract year. Table 7, *The Number of Enrolled Clients Served and Cost Savings 2004/5-2007/8*, provides additional details about enrolled clients. Because increases in the number of enrolled clients served will be accomplished without an increase in overall costs, OOS will serve significantly more enrolled clients with the same level of funding over the three years of the contract period.

<b>TABLE 7: THE NUMBER OF ENROLLED CLIENTS SERVED &amp; COSTS SAVINGS 2004/5-2007/8</b>				
<b>Year</b>	<b>2004-2005</b>	<b>2005-2006</b>	<b>2006-2007</b>	<b>2007-2008</b>
<b>Comprehensive Center (Includes ASSETS)</b>	240	260	296	336
<b>Affiliate Center</b>	60	100	100	100
<b>Total Served</b>	300	360	396	436
<b>Average Per Client Cost</b>	\$7,667	\$6,389	\$5,808	\$5,275
<b>Cost Savings over 2004/5</b>	n/a	\$1,278	\$1,859	\$2,391
<b>%Cost Savings over 2004/5</b>	n/a	17%	24%	31%

The lowering of enrolled per client costs described in Table 7 will be achieved by increasing the resources available to Affiliate and Satellite One-Stop Career Centers, taken directly out of the OOS allocation, and by significant improvements in efficiency at comprehensive One-Stop Centers. The current allocation for Affiliate and Satellite Sites is \$225,000 per year, made as a separate allocation directly from the Oakland WIB. OOS proposes to increase Affiliate and Satellite allocations to \$625,000 per year, a 178% increase. OOS will provide the Spanish Speaking Unity Council with an additional annual allocation of \$225,000, which represents a 300% increase in the resources available to serve individuals in the Fruitvale and San Antonio sections of Oakland. OOS will provide Lao Family Community Development, Inc. with an additional annual allocation of \$125,000, which represents a 166% increase in the resources available to serve some of Oakland's hardest to serve individuals, particularly for job seekers who have limited English-speaking skills.

At the same time, OOS will provide annual allocations of \$25,000 each to two new Satellite One-Stop Career Centers: Allen Temple/ATHEDCO and the Regional Technical Training Center (RTTC). Increased and new allocations to Affiliate and Satellite One-Stop sites will total \$400,000, which represents over 17% of OOS' budget for One-Stop Operations of \$2,300,000. Increasing allocations to Affiliate and Satellite community partners will not only enable more enrolled clients to be served by the system, but it will also enable greater numbers of universal clients to be served. OOS recognizes that re-allocation of resources is an essential component of increasing system-wide efficiency, and ensuring that services are equally available for all neighborhoods in the city of Oakland.

## **2.C. Personnel Budget**

The proposed \$2.3 Million budget for OOS is a highly cost-effective approach to managing resources available for the operation of 2 comprehensive One-Stop Centers, 3 Affiliate One-Stop Career Centers, and 2 Satellite One-Stop Career Centers. OOS personnel costs are \$1,371,752 and, when combined with allocations for Affiliates, totals \$1,771,752. This demonstrates that an impressive 77% of WIA resources will be spent on direct services to businesses, workers, and job seekers in the City of Oakland. A Summary Budget Worksheet for OOS for the fiscal year beginning July 1, 2005 can be found on page 74, below.

OOS provides universal services for an estimated 8,200 individuals each year, and is responding to the special needs of Oakland residents who utilize the One-Stop system on a walk-in basis by providing OOS staff to support job seekers' self-directed work search programs and activities. Proposed personnel costs for universal services clients are \$484,523 for the 2005-2006 contract

year, approximately 35% of overall personnel cost. Supported services for universal clients, who represent 96% of OSS clients, are provided by 23 staff at OOS, who spend a part of each day assisting self-directed, walk in job seekers. OOS' long and productive experience in meeting the needs of residents with multiple barriers to employment confirms the value of the resources invested in universal services.

Proposed personnel costs for services for enrolled (adult intensive and dislocated worker) clients are \$568,469, and account for 41% of overall personnel costs. Career counselors are fully engaged in meeting the needs of enrolled clients, as are many of the staff of OOS' parent organization, the Oakland PIC.

Proposed personnel costs for services for youth clients are \$36,956, and account for 2% of overall personnel costs, which is consistent with OSS' role as a primarily adult services provider. OOS refers youth who are seeking employment services to those organizations that are the designated Youth Services Contracts holders and the Youth Career-Center.

The proposed OSS Personnel Budget provides \$281,803 for support services essential to the efficient functioning of One-Stop Career Center Operations. Support personnel include human resources, fiscal, payroll, and other functions necessary to the ongoing provision of services to Oakland's businesses, workers, and job seekers.

## **2.D. Non-Personnel Budget**

Total non-personnel costs in the proposed budget are \$528,248 (23% of the overall OOS budget), which are detailed on page 74. Non-personnel costs include \$374,145 for rent of the flagship 1212 Broadway Downtown Oakland One-Stop Career and Business Services Center and office space for management and support staff; \$154,103 is allocated for insurance, equipment, supplies, printing, staff travel and training, consultants, and miscellaneous costs.

<b>OAKLAND WIB CENTER OPERATOR BUDGET PROPOSAL, FY 2005 - 0</b>
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Ref #	CATEGORY	AMOUNT
	<b>Personnel Costs</b>	
1	Staff Salaries+Taxes	\$1,249,392
2	Benefits	\$122,360
3	<b>Total Personnel Costs</b> (must match total from personnel breakdown worksheet)	<b>\$1,371,752</b>
	Total allocated from this budget for expansion of Unity Council, Lao Family, Allen Temple and Regional Technical Training Center Affiliate and Satellite sites	400,000
	<b>Non-personnel Costs</b>	
4	Rent	\$374,145
	• estimated or actual square footage	18,670 Sq.Ft.
	• estimated or actual cost per square foot	\$1.67 Per Sq.Ft
5	Insurance	\$18,906
6	Equipment	\$21,311
7	Supplies	\$30,089
8	Printing, Copying and Materials	\$34,027
9	Staff travel and training	\$9,521
10	Consultant/contract services	\$24,740
11	Other miscellaneous operating expenses	\$15,509
12	<b>Total Non-Personnel Costs</b>	<b>\$528,248</b>
13	<b>Total Budget</b>	<b>\$2,300,000</b>
(Note: Total Center Operator budget proposal must be no more than \$2.3 million.)		

<b>SERVICE LEVELS PROPOSED FOR FY 04-05</b>		
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A.	Number of Universal Services Clients	8500
B.	Number of Intensive Services Clients enrolled (Adult + Dislocated Worker)	360
C.	Number of enrolled Intensive Services placed (within two years of enrollment)	288
D.	Cost-per placement efficiency ratio (Placements divided by budget total)	\$7,986

Staffing Breakdowns by Contract and by Service Type										
Position Title	Agency Dept.	Dollar Amount of Total Annual Salary+ Benefit cost	By Contracted Role for 2005-06		By Service Type 3					
			% of position charged to system administrator role	% of position charged to Center Operator Role						
Chief Executive Officer		\$102,687	65	35	65%	19%				16%
Director	Admin	\$74,174	50	50	50%	50%				
Admin Support	Admin	\$40,635	62	38	35%	65%				
Admin Support	Admin	\$34,418	100				90%	5%		5%
Communication support	Admin	\$27,458	62	38		100%				
Director	Fiscal	\$95,818	63	37	100%					
Manager, Accounting	Fiscal	\$71,663	63	37	100%					
Benefits/Payroll Manager	Fiscal	\$73,832	63	37	100%					
Accounts Payable Coordinator	Fiscal	\$49,847	63	37	100%					
Payroll Assistant	Fiscal	\$39,293	63	37	100%					
Director	OOS	\$71,175		100			30%	70%		
<b>Career Counseling Services</b>										
Manager	OOS	\$57,671		100				100%		
Sr. Career Counselor	OOS	\$58,768		100			10%	90%		
Sr. Career Counselor	OOS	\$46,483		100			10%	90%		
Sr. Career Counselor	OOS	\$44,948		100			10%	90%		
Career Counselor	OOS	\$47,507		100			10%	90%		
Career Counselor	OOS	\$40,438		100			10%	90%		
Career Counselor	OOS	\$46,337		100			10%	90%		
Career Counselor Technician	OOS	\$38,147		100			10%	90%		





#### **IV. Center Operator Application from ACS, Inc.**

The following are the Executive Summary and Budget Narrative sections of the application for the WIB's Center Operator role as submitted by ACS:

##### **EXECUTIVE SUMMARY**

ACS will implement an agile, comprehensive system that continually adapts to the changing needs of job seekers, employers, and the City of Oakland. We will provide a pro-active, robust workforce system through our operational capability and experience, using an innovative and customer-centered service delivery approach. ACS currently operates more than 100 Career Centers across the nation. Together with our workforce partners, we serve job seekers, employers, and communities by continually seeking new ways to help individuals attain their goals. Since 1996, ACS has placed more than 800,000 individuals in jobs, many with significant barriers to employment.

ACS' strong management team and our partners – Hispanic Chamber of Commerce of Alameda County and YWCA of Oakland – will ensure that each staff member is responsible for meeting specific, clearly understood goals designed for the attainment of excellent performance. We will make the One-Stop Career Centers an inviting place for participant customers and business managers to come to meet their employment needs. ACS management staff at our western regional office in California will provide substantial support to our project team in the Oakland area, ensuring the success of the local team in delivering top-notch workforce services in the most efficient, effective manner possible. We will bring “best practices” from our successful One-Stop Centers across the nation, while maintaining and developing unique, culturally sensitive strategies for the specific needs of the Oakland community. Our management philosophy emphasizes outstanding performance; close collaboration with the Oakland Workforce Investment Board, the system administrator, and community stakeholders; leadership in innovation and creativity; excellent customer service; and on-going staff development. These factors will allow us to **triple the number of participant customers served and obtain self sufficient employment**, bringing Oakland performance in line with ACS-operated One-Stops in other locations.

### **Core and Intensive Services**

A dynamic offering of Core Services will be available to the universal population. Core Services are basic workforce service offerings geared to all job seekers and generally require limited one-on-one staff assistance while providing information or assistance in the resource room. For customers unable to secure employment through Core Services, ACS will provide Intensive Services based on meeting mandated eligibility requirements. Documented Core Services will be reviewed and evaluated prior to moving the customer into Intensive Services. It is within the Intensive Services component that a significant increase in number of participants served will be achieved, **dramatically lowering the cost per participant**. For those customers unable to secure employment after receiving Intensive Services, ACS will coordinate referrals and leverage available training opportunities before accessing WIA funded and approved training providers or on the job training. ACS will also provide our time tested follow-up services for 12 months after job placement to ensure job retention and satisfaction with the services provided.

### **Value-Added Features**

**Specialized Curricula** – ACS uses its *VantEDGE–Principles of Success™* and *VantEDGE–Job Search for Professionals and Skilled Workers™* curricula to emphasize the importance of work, reinforce the idea of personal responsibility, and provide tools to each person to meet their goals.

**Continuous Quality Improvement** – Our continuous improvement strategies provide oversight and evaluation of all case management operations, administrative processes, and management functions.

**Technology Enhancements** – ACS offers our innovative InSite activity tracking system to provide a platform for all Career Center employees, including partners, to share customer information, thereby reducing or eliminating redundancies and duplication of effort.

**Staff Development** – All One-Stop Career Center staff will be trained in customer service and the One-Stop concepts of universality, customer choice, integration, and performance-driven outcomes.

**Community Outreach** – ACS, in coordination with the WIB, our partners – Hispanic Chamber of Commerce and YWCA, and our Marketing Assistance Program (MAP) will ensure that every citizen who needs One-Stop services will have been reached and have had the opportunity to be served.

**Transition** – ACS has substantial experience in transitioning projects and ensures a seamless transition without disruption of services to One-Stop Center customers. We will work with the Board, Board staff, current operator, System Administrator, and partners to make desired changes in a systematic fashion and to communicate changes to customers and the current operator's staff.

## **BUDGET NARRATIVE**

### **DETAILED BUDGET PROPOSAL**

The tabbed section following this section contains the proposed budget (using the forms required in the RFP) as well several detail budget pages for operation of the Oakland One-Stop Career Centers.

### **BUDGET NARRATIVE**

The following is the Budget Narrative for our proposed budget.

## Oakland One-Stop Career Center Operator-Budget Narrative

Personnel:	FTE	Salary
Estimated number of staff to operate the One-Stop Career Center	20.00	\$ 745,403
 Fringe Benefits:		
F.I.C.A.	7.65% of Total Salaries	\$57,023
Unemployment & Disability	estimated at 1.5% of total salaries	\$11,181
Medical & Life Insurance	estimated at \$6741 per employee , includes health insurance, life insurance, dental, vision, and hearing.	\$134,697
401-K	1.25% of total salaries, new employees are not eligible until the second year of employment.	
Tuition Reimbursement	estimated at .3% of total salaries new employees are not eligible until the second year of employment.	\$0
Workers Comp	estimated at 1.2% of total salaries	\$8,945
Benefits Administration	estimated at 3.55% of total salaries, includes workers' compensation computations, payment of funds, payroll preparation, disbursment of checks, direct deposit mailing, cost of human resources, cost of training for all employees for wellness training and development, and administration of the benefits plan for all employees.	<u>\$26,462</u>
<b>TOTAL LABOR BENEFITS</b>		<u><b>\$238,308</b></u>
	% of salary	<u><b>32%</b></u>

Estimated Costs are based on our past and current project expenditures in the California Area

Rent	Rent is based on \$3.00 a square foot and approx 5,000 sqft needed Paid thru subcontractor and includes utilites	
Automation Cost	Estimated cost is \$3,500 per employee This includes computers and License fees	\$70,000
	Equipment Total	<u>\$70,000</u>
Supplies	Estimated cost is \$1,500 per employee	\$30,000
	Supplies Total	<u>\$30,000</u>
Printing/Other	Estimated cost is \$225 per employee	\$4,500
	Printing, Copying and Material Total	<u>\$4,500</u>

### Oakland One-Stop Career Center Operator-Budget Narrative, cont.

<i>Staff travel and training (excludes transitional travel)</i>		
Travel	Travel is estimated at \$0.36 per mile. Travel expense also includes airfare, hotel, and meals	\$22,260
Emp training	Estimated cost is \$279 per employee	\$5,580
Material	Estimated cost is \$50 per employee	\$1,000
Staff travel and training (excludes transitional travel) Total		\$28,840
Subcontractor	Cost to include Partnering Staff, travel,Supplies,Contractor phone cost, rent and utilities	\$557,759
Other Miscellaneous Operating Expenses-Subcontractor Total		\$557,759
Postage	Estimated cost is \$225 per employee	\$15,000
Telephone	Estimated cost is \$1500 per employee	\$30,000
Data Lines	Estimated cost is \$600 per employee                      paid by subcontractor	\$12,000
Maintenance	Estimated cost is \$600 per employee	\$12,000
Equip Rental	Estimated cost is \$600 per employee Cost includes copiers and Postage machines	\$12,000
Equip Repair	Estimated cost is \$500 per employee	\$10,000
Freight/Msgr.	Estimated cost is \$150 per employee	\$3,000
Advert	Estimated cost is \$250 per employee	\$5,000
Dues/subsc	Estimated cost is \$250 per employee <i>Cost includes area newspapers, and subscription</i>	\$5,000
Recruiting	Estimated cost is \$150 per employee	\$3,000
Audit	Approx cost for ACS Audit and Internal Monitoring Unit	\$10,742
Drug Testing/Recruitment	All new employees are required to take a drug test and background check. Estimated cost for background check and drug testing is \$75.00 (Cost includes 2 extra tests)	\$1,650
License Fee	Business tax fee for \$ 2,000,000 contract in Oakland is approx.	\$3,600
Transitional Cost	Cost for transition team expense to recruit and set up project includes indirect and profit	\$58,613
Indirect Cost	Indirect cost is based on 14.53% of all operational cost Excludes transitional cost	\$261,221
Profit	Profit is based on 10% of all cost except transitional cost	\$205,902
Other Miscellaneous Operating Expenses Total		\$648,728

Total Budget **\$2,323,538**

## **MATCHING AND VALUE-ADDED RESOURCES**

The products and services provided in ACS' proposal are value-added deliverables of our service delivery approach. The price for these products and services is included in the funds requested for overall services, with payment provisions to be negotiated at time of contract award.

ACS and our partners offer the WIB substantial matching resources every year of the contract as shown in **Exhibit 3**. Note that the amounts total over 6% of the 1<sup>st</sup> year contract value, rising to over 10% of the annual contract value in the 2<sup>nd</sup> & 3<sup>rd</sup> years of the contract.

## **LEVELS AND PRIORITIES OF SERVICE**

A dynamic offering of Core Services will be available to the universal population. For customers unable to secure employment through Core Services, ACS will provide Intensive Services based on meeting mandated eligibility requirements. It is within the Intensive Services component that a significant increase in number of participants served will be achieved, **dramatically lowering the cost per participant**. As shown in the budget, our estimated cost per placement is \$2,480. This is almost one-fifth of the current cost of \$10,916 per placement. This is a conservative estimate when compared to other similar ACS projects. As a result of our experience and techniques, we are able to plan to serve several times as many clients as in the current Oakland WIB budget.

## **PLANS FOR BRINGING COST PER CLIENT TO REASONABLE LEVELS**

The narrative section has discussed several techniques to be used to improve service levels. In addition to those points, other parts of our strategy are summarized below:

- Build a team with all providers – It is critical that all of the providers of services be a team. ACS' style is to serve all clients in the manner that will be best for the client – regardless of company name. In so far as possible, clients are not aware of which company is providing needed services.
- Provide an inviting Career Center – Participants need to have an inviting Career Center that is upbeat in appearance and atmosphere. While our clients frequently have serious issues to change in their lives, the mood in the Center must be optimistic and inviting.

- Provide the tools needed by each participant – Our narrative detailed a number of tools that we use to help clients. This wide array means that each client can receive the help they need.
- Use improved recruiting techniques – With our experience operating many One-Stop Career Centers across the nation, we have developed methods of recruiting that work.
- Make sure that jobs are available – Participants ultimately need a self-sufficient job. While we understand that the Business Services provider has primary responsibility for placement, our proposed Business Liaison will work with the provider to ensure that every person has an employment future.

### **MUTUALLY BENEFICIAL CONTRACT**

ACS is privileged to propose to operate the Oakland One-Stop Career Centers. When selected for award for the proposed contract, and as there was no model contract in the RFP, we look forward to negotiating mutually beneficial terms and conditions to the contract for the proposed project.



## BUDGET WORKSHEETS

<b>OAKLAND WIB CENTER OPERATOR BUDGET PROPOSAL, FY 2005 - 06</b>		
Ref #	CATEGORY	AMOUNT
1	<b>Staff Salaries + Taxes</b>	<b>\$745,403</b>
2	<b>Benefits</b>	<b>\$238,308</b>
3	<b>Total Personnel Cost</b> (Must match total from personnel breakdown worksheet)	<b>\$983,711</b>
<b>Non-personnel Costs</b>		
4	<b>Rent *per year</b>	
	*estimated or actual square footage	5,000
	*estimated or actual cost per square foot	\$3.00
5	<b>Insurance</b>	<b>part of indirect</b>
6	<b>Equipment</b>	<b>\$70,000</b>
7	<b>Supplies</b>	<b>\$30,000</b>
8	<b>Printing, Copying, and Materials</b>	<b>\$4,500</b>
9	<b>Staff travel and training</b>	<b>\$28,840</b>
10	<b>Consultant/contract service</b>	
11a	<b>Other miscellaneous operating expenses-subcontractor</b>	<b>\$557,759</b>
11b	<b>Other miscellaneous operating expenses</b>	<b>\$648,727</b>
12	<b>Total Non-Personnel Cost</b>	<b>\$1,339,827</b>
13	<b>Total Budget</b>	<b>\$2,323,538</b>

(Note: Total Central Operator budget proposal must be no more \$2.3 million.)

<b>SERVICE LEVELS PROPOSED FOR FY 04 - 05</b>		
A.	Number of Universal Service Clients	14,216
B.	Number of Intensive Services Clients enrolled ( Adult + Dislocated Workers)	1,006 Total (417 Adults, 589 Dislocated)
C.	Number of enrolled Intensive Services placed (Within two years of enrollment)	937
D.	Cost-per placement efficiency ratio (Placements divided by budget total)	\$2,480

OAKLAND ONE-STOP CAREER CENTER OPERATOR- ACS EMPLOYEES

ACS		By Contracted Role 2			By Service Type 3					
Position Title	Agency Dept. 1	Dollar Amount of Total Annual Salary + Benefits cost	% of position charged to System Administrator role	% of position charged to Center Operator role	Admin Cost	System Cost (non - Admin)	Universal Services	Intensive Services, except training	Training	Youth
Project Leader	CarCtr	\$ 95,019		100%	50%		15%	30%	5%	
Operations/Center Manager	CarCtr	\$ 65,989		100%	15%		40%	40%	5%	
Financial Admin	CarCtr	\$ 62,026		100%	100%					
Program /Center Manager	CarCtr	\$ 65,985		100%	10%		25%	50%	15%	
Quality Assurance Specialist	CarCtr	\$ 47,509		100%			60%	40%		
Customer Service Rep	CarCtr	\$ 42,230		100%	10%		50%	40%		
Resource Room Coord	CarCtr	\$ 42,494		100%			80%	20%		
Resource Room Coord	CarCtr	\$ 42,494		100%	0%		80%	20%		
Workshop Facilitator	CarCtr	\$ 42,230		100%			50%	50%		
Workshop Facilitator	CarCtr	\$ 42,230		100%	0%		50%	50%		
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Career Specialist	CarCtr	\$ 43,550		100%			20%	45%	35%	
Total		\$ 983,711		20	1.85	0.00	6.50	7.90	3.75	-

1. Agency Dept. must trace back to organizational chart submitted.
2. If applicant seeks only one contract role, put 100% in the appropriate column, in the role with each position title. Note that the breakdown sought here is distinct from the breakdown by service type.
3. Please refer to the Glossary for assistance defining these cost categories. Note that the breakdown sought here is distinct from the breakdown by contract role, the total percentage by service type should add to 100% for each position.

## OAKLAND ONE-STOP CAREER CENTER OPERATOR-SUBCONTRACTOR

Subcontractor			By Contacted Role 2		By Service Type 3					
Position Title	Agency Dept. 1	Dollar Amount of Total Annual Salary + Benefits cost	% of position charged to System Administrator role	% of position charged to Center Operator role	Admin Cost	System Cost (non Admin)	Universal Services	Intensive Services, except training	Training	Youth
<b>Hispanic Chamber of Commerce</b>										
Career Spec/Outreach	CarCtr	\$ 40,416		100%			20%	45%	35%	
Business Service	CarCtr	\$ 66,500		100%			100%			
Business Service	CarCtr	\$ 66,500		100%			100%			
Administration Asst	CarCtr	\$ 42,560		100%	100%					
<b>YWCA</b>										
Workshop Facilitator	CarCtr	\$ 47,880		100%			50%	50%		
Total		\$ 263,856		5.00	1.00		2.70	0.95	0.35	-

1. Agency Dept. must trace back to organizational chart submitted.
2. If applicant seeks only one contract role, put 100% in the appropriate column, in the role with each position title. Note that the breakdown sought here is distinct from the breakdown by service type.
3. Please refer to the Glossary for assistance defining these cost categories. Note that the breakdown sought here is distinct from the breakdown by contract role, the total percentage by service type should add to 100% for each position.

**OAKLAND ONE-STOP CAREER CENTER OPERATOR  
Workforce Center Services  
Budget Detail - Personnel Costs - One-Stop**

Col. A	Col. B	Col. C	Col. D	Col. E	Col. F	Col. G	Col. H	Col. I	
								% of Program Annual Salary & Fringe Paid by Workforce Center	
Item #	Position Title	# of FTEs	Annual Salary	12 months Salary	12months Fringe Benefits	Total 12 months Salary & Fringe Benefits	% of Administrative Annual Salary & Fringe Paid by Workforce Center	\$ of Administrative Annual Salary & Fringe Paid by Workforce Center	% of Program Annual Salary & Fringe Paid by Workforce Center
1	Customer Service Rep	1	\$32,000	\$32,000	\$10,230	\$42,230	10%	\$4,223	90.00%
2	Resource Room Coord	2	\$32,200	\$64,400	\$20,589	\$84,989		\$0	100.00%
3	Career Specialist	10	\$33,000	\$330,000	\$105,502	\$435,502	0%	\$0	100.00%
4	Quailty Assurance Specialist	1	\$36,000	\$36,000	\$11,509	\$47,509		\$0	100.00%
5	Workshop Facilitator	2	\$32,000	\$64,000	\$20,461	\$84,461	0%	\$0	100.00%
6	Project Leader	1	\$72,000	\$72,000	\$23,019	\$95,019	50%	\$47,509	50.00%
7	Operations/Center Manager	1	\$50,000	\$50,000	\$15,985	\$65,989	10%	\$6,599	90.00%
8	Financial Admin	1	\$47,000	\$47,000	\$15,026	\$62,026	100%	\$62,026	0.00%
9	Program /Center Manager	1	\$50,000	\$50,000	\$15,985	\$65,985	10%	\$6,599	90.00%
								\$0	100.00%
							0%	\$0	100.00%
	<b>ACS Total</b>	<b>20</b>	<b>\$384,200</b>	<b>\$745,400</b>	<b>\$238,307</b>	<b>\$983,711</b>		<b>\$126,956</b>	
<b>YWCA</b>									
1	Career Spec/Outreach	1	\$31,824	\$31,824	\$8,592	\$40,416		\$ -	100.00%
	<b>YWCA Total</b>	<b>1</b>	<b>\$31,824</b>	<b>\$31,824</b>	<b>\$8,592</b>	<b>\$40,416</b>			
	<b>Chamber</b>								
1	Business Service	1	\$50,000	\$50,000	\$16,500	\$66,500	0%	\$ -	100.00%
2	Business Service	1	\$50,000	\$50,000	\$16,500	\$66,500	0%	\$ -	100.00%
3	Administration Asst	1	\$32,000	\$32,000	\$10,560	\$42,560	0%	\$ -	100.00%
4	Workshop Facilitator	1	\$36,000	\$36,000	\$11,880	\$47,880	0%	\$ -	100.00%
	<b>Chamber Total</b>	<b>4</b>	<b>\$168,000</b>	<b>\$168,000</b>	<b>\$55,440</b>	<b>\$223,440</b>		<b>\$ -</b>	
	<b>Contractor Total</b>	<b>5</b>	<b>\$199,824</b>	<b>\$199,824</b>	<b>\$64,032</b>	<b>\$263,856</b>			<b>100%</b>

**OAKLAND ONE-STOP CAREER CENTER OPERATOR  
LINE ITEM BUDGET**

<b>Line Item</b>	<b>Program Cost</b>	<b>WIA Adult</b>	<b>WIA Dislocated</b>	<b>Transitional Cost</b>	<b>Total Cost With Transitional</b>
<b>Personnel</b>					
Salaries	\$745,400	\$309,341	\$436,059	\$17,917	\$763,317
Fringes	\$238,311	\$98,899	\$139,412	\$5,728	\$244,039
Other	\$0				\$0
<b>Total Personnel</b>	<b>\$983,711</b>	<b>\$408,240</b>	<b>\$575,471</b>	<b>\$23,645</b>	<b>\$1,007,355</b>
<b>Non Personnel</b>					
Travel	\$22,260	\$9,238	\$13,022	\$22,880	\$45,140
Supplies	\$30,000	\$12,450	\$17,550		\$30,000
Printing/Other	\$4,500	\$1,868	\$2,633		\$4,500
Postage	\$15,000	\$6,225	\$8,775		\$15,000
Telephone	\$30,000	\$12,450	\$17,550		\$30,000
Maintenance	\$12,000	\$4,980	\$7,020		\$12,000
Equip Rental	\$12,000	\$4,980	\$7,020		\$12,000
Rent	\$0	\$0	\$0		\$0
Equip Repair	\$10,000	\$4,150	\$5,850		\$10,000
Data Lines	\$12,000	\$4,980	\$7,020		\$12,000
Freight/Msg.	\$3,000	\$1,245	\$1,755		\$3,000
Advert	\$5,000	\$2,075	\$2,925		\$5,000
Dues/subsc	\$5,000	\$2,075	\$2,925		\$5,000
Drug Test	\$1,650	\$685	\$965		\$1,650
Recruiting	\$3,000	\$1,245	\$1,755		\$3,000
Emp training	\$5,580	\$2,316	\$3,264		\$5,580
Material	\$1,000	\$415	\$585		\$1,000
Audit	\$10,742	\$4,458	\$6,284		\$10,742
Automation Cost	\$70,000	\$29,050	\$40,950		\$70,000
Misc -	\$3,600	\$1,494	\$2,106		\$3,600
Subcontractor	\$557,759	\$231,470	\$326,289	\$0	\$557,759
<b>Total Non-Personnel Costs</b>	<b>\$814,091</b>	<b>\$337,848</b>	<b>\$476,243</b>	<b>\$22,880</b>	<b>\$836,971</b>
<b>Total Operational Costs</b>	<b>\$1,797,802</b>	<b>\$746,088</b>	<b>\$1,051,714</b>	<b>\$46,525</b>	<b>\$1,844,327</b>
<b>Indirect Rate</b>	<b>\$261,221</b>	<b>\$108,407</b>	<b>\$152,814</b>	<b>\$6,760</b>	<b>\$267,981</b>
<b>Client Direct Expenses</b>					<b>\$0</b>
<b>Total Client Direct Payments</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Profit</b>	<b>\$206,902</b>	<b>\$85,449</b>	<b>\$120,453</b>	<b>\$5,328</b>	<b>\$211,231</b>
<b>Total Costs</b>	<b>\$2,264,925</b>	<b>\$939,944</b>	<b>\$1,324,981</b>	<b>\$58,613</b>	<b>\$2,323,538</b>

**OAKLAND ONE-STOP CAREER CENTER OPERATOR  
SUBCONTRACTOR LINE ITEM BUDGET-YWCA**

	WIA Adult	WIA DW	WIA Youth	Total Cost
<b>Personnel</b>				
Salaries	\$13,207	\$18,617		\$31,824
Fringes	\$3,566	\$5,027		\$8,592
Travel	\$374	\$527		\$900
Staff Development				\$0
Employee Recruitment				\$0
<b>Total Personnel</b>	<b>\$17,146</b>	<b>\$24,170</b>		<b>\$41,316</b>
Supplies	\$1,038	\$1,463		\$2,500
Audit				
Postage & Freight	\$125	\$176		\$300
Marketing				
Maintenance & Repairs				
Rent	\$4,482	\$6,318		\$10,800
Telephone	\$374	\$526		\$900
Dues & Subscriptions				
Information Systems				
Property Plant & Equipment				
Miscellaneous				
Insurance				
Equipment Rental				
<b>Total Non-Personnel</b>	<b>\$6,018</b>	<b>\$8,482</b>		<b>\$14,500</b>
<b>TOTAL OPERATIONAL EXPENSES</b>	<b>\$23,164</b>	<b>\$32,652</b>	<b>\$0</b>	<b>\$55,816</b>
<b>Total Client Direct</b>				
<b>Indirect</b>	<b>\$2,780</b>	<b>\$3,918</b>	<b>\$0</b>	<b>\$6,698</b>
<b>Profit</b>				
<b>Total Costs</b>	<b>\$25,943</b>	<b>\$36,570</b>	<b>\$0</b>	<b>\$62,514</b>

**OAKLAND ONE-STOP CAREER CENTER OPERATOR  
SUBCONTRACTOR LINE ITEM BUDGET-HISPANIC CHAMBER**

	WIA Adult	WIA DW	WIA Youth	Total Cost
<b>Personnel</b>				
Salaries	\$69,720	\$98,280		\$168,000
Fringes	\$23,008	\$32,432		\$55,440
Travel	\$2,905	\$4,095		\$7,000
Staff Development				\$0
Employee Recruitment				\$0
<b>Total Personnel</b>	<b>\$95,633</b>	<b>\$134,807</b>		<b>\$230,440</b>
Supplies	\$5,603	\$7,898		\$13,500
Audit				
Postage & Freight	\$249	\$351		\$600
Marketing				
Maintenance & Repairs				
Rent	\$74,700	\$105,300		\$180,000
Telephone	\$996	\$1,404		\$2,400
Dues & Subscriptions				
Information Systems	\$6,225	\$8,775		\$15,000
Property Plant & Equipment				
Miscellaneous	\$101	\$142		\$243
Insurance				
Equipment Rental				
<b>Total Non-Personnel</b>	<b>\$87,873</b>	<b>\$123,870</b>		<b>\$211,743</b>
<b>TOTAL OPERATIONAL EXPENSES</b>	<b>\$183,506</b>	<b>\$258,677</b>	<b>\$0</b>	<b>\$442,183</b>
<b>Total Client Direct</b>				
<b>Indirect</b>	<b>\$22,021</b>	<b>\$31,041</b>	<b>\$0</b>	<b>\$53,062</b>
<b>Profit</b>				
<b>Total Costs</b>	<b>\$205,527</b>	<b>\$289,718</b>	<b>\$0</b>	<b>\$495,245</b>

**CITY OF OAKLAND  
CITY ADMINISTRATOR'S OFFICE  
CONTRACT COMPLIANCE AND  
EMPLOYMENT SERVICES**

# MEMO

**TO:** Al Auletta, Coordinator  
Workforce Investment Board

**FROM:** Deborah Barnes, Manager  
Contract Compliance and Employment Services

**RE:** WIB – One Stop Career Center Operator  
WIB – One Stop System Administrator

**DATE:** January 13, 2005

Staff has reviewed the five proposals received for the referenced projects. The analyses appear below:

### WIB – One Stop Career Center Operator

Contractor	LBE	SLBE	Total	Preference Points Achieved
Oakland Private Industry Council	10%	23%	33%	3
ACS State and Local Solutions	0%	24%	24%	2

Both contractors achieved and exceeded the 20% L/SLBE program requirement. Each has also been awarded preference points as demonstrated in the chart above.

### WIB – One Stop System Administrator

Contractor	LBE	SLBE	Total	Preference Points Achieved
TTI America	0%	21%	21%	2
Oakland Private Industry Council	10%	0%	10%	0
Primus Consulting Group	0%	20%	20%	2



**Attachment D - 2**

TTI America and Primus Consulting Group achieved and/or exceeded the 20% L/SLBE program requirement. Each has also been awarded preference points as demonstrated in the chart above. Oakland Private Industry Council did not achieve the 20% L/SLBE program requirement and is therefore deemed non responsive.

If you have any questions, or require more information, please contact Mary Mayberry, the compliance officer assigned to this project, at 238-7324.

Cc: James Bondi  
Mary Mayberry  
File

Oakland WIB 2005-06 Budget

Attachment E

A Ref. #	B	C 04-05 obligated carry-forward funds (not counted as either revenues or expenses in 05-06 budget)	D 2005-06 Approved Budget	E Selected 2005-06 approved subtotals
<b>CONTRACTED SYSTEM ADMINISTRATOR, CENTER OPERATOR AND OTHER FUNCTIONS</b>				
<b><u>System Administrator</u></b>				
				PIC SysAd subtotal:
1	PIC SysAd Personnel		\$715,308	
2	PIC SysAd Non-Personnel		\$162,881	
3	PIC SysAd Fiscal/Admin Personnel		\$278,934	\$1,300,000
4	PIC SysAd Fiscal/Admin Non-Personnel		\$62,278	
5	PIC Rapid Response Coordination		\$80,599	
6	Customized Training		\$75,000	
7	ITA/OJT Contracts		\$255,000	
8	Construction Trades Outreach		\$45,000	
9	EASTBAY Works		\$110,000	
10	Youth Subcontracts/Services	\$160,000	\$800,000	Youth services subtotal:
11	Youth One Stop Services		\$130,000	
12	Youth Wages and Support Services	\$177,000	\$590,000	\$1,520,000
13	<b>System Administrator Sub-Total</b>		<b>\$3,305,000</b>	
<b><u>One Stop Center Operators</u></b>				
				PIC CtrOp subtotal:
14	PIC CtrOp Program Personnel		\$973,416	
15	PIC CtrOp Program Non-Personnel		\$392,617	
16	PIC CtrOp Fiscal/Admin Personnel		\$169,576	\$1,900,000
17	PIC CtrOp Fiscal/Admin Non-personnel		\$63,390	
18	PIC Rapid Response Program Activities		\$301,001	
19	One Stop Affiliate Subcontracts	\$17,000	\$650,000	
20	Adult and DW Support Services		\$150,256	
21	<b>Center Operator Sub-Total</b>		<b>\$2,700,256</b>	
<b><u>Other Contracted Functions</u></b>				
22	Business and Professional Services		\$150,000	
23	Older Workers/ASSETS Program		\$150,000	
24	<b>SUBTOTAL, CONTRACTED LINE ITEMS</b>		<b>\$6,305,256</b>	
<b><u>Other Programs</u></b>				
25	Youth Self-Sufficiency Project		\$820,811	
26	MSJP Summer 2006		\$125,000	
27	Measure Y Programs		\$1,927,598	
<b>FUNCTIONS RETAINED BY CITY OF OAKLAND DEPARTMENTS AND STAFF</b>				
28	WIB Personnel		\$682,642	WIB/City cost subtotal:
29	WIB Operations & Maintenance		\$101,500	
30	City Fiscal		\$84,072	\$868,214
31	<b>City Line Items Sub-Total</b>		<b>\$868,214</b>	
32	<b>TOTAL 2005-06 WIB BUDGET</b>		<b>\$10,046,879</b>	
	<b>TOTAL REVENUE (from Exhibit A)</b>		<b>\$10,414,148</b>	
	<b>BALANCE</b>		<b>\$367,269</b>	

Adult Provider performance and allocation comparison

Attachment F

One-Stop Provider	2002-03 Program Year Outcomes to 3/31/04 (7 quarters)				2003-04 Program Year Outcomes to 3/31/05 (7 quarters)				Approved for 2005-06 Program Year				
	Placement to Goal Ratio	Total One-Stop Allocation	Approx. Intensive Services Allocation	Cost per Placement	Placement to Goal Ratio	Total One-Stop Allocation	Approx. Intensive Services Allocation	Cost per Placement	Total One-Stop Allocation	Est. Intensive Services Allocation	Est. 05-06 placement goal	Cost per placement at past avg. success ratio	Cost per placement at 100% success ratio
PIC (2 sites)	81 : 89 (91%)	\$1,998,902	\$939,484	\$11,599	92 : 122 (75%)	\$2,382,031	\$1,119,555	\$12,169	\$1,900,000	\$893,000	188	\$5,801	\$4,757
English Center	15 : 16 (94%)	\$50,000	\$23,500	\$1,567	11 : 14 (79%)	\$60,000	\$28,200	\$2,564	\$100,000	\$47,000	29	\$1,894	\$1,648
Lao Family	15 : 13 (115%)	\$50,000	\$23,500	\$1,567	23 : 20 (115%)	\$60,000	\$28,200	\$1,226	\$200,000	\$94,000	23	\$3,583	\$4,120
Unity Council	8 : 11 (73%)	\$50,000	\$23,500	\$2,938	13 : 13 (100%)	\$60,000	\$28,200	\$2,169	\$300,000	\$141,000	34	\$4,682	\$4,120
Assets	29 : 21 (138%)	\$150,000	\$150,000	\$5,172	18 : 23 (78%)	\$135,000	\$135,000	\$7,500	\$150,000	\$150,000	25	\$5,618	\$6,011
<b>TOTAL</b>	<b>148 : 150 (99%)</b>	<b>\$2,298,902</b>	<b>\$1,159,984</b>	<b>\$7,838</b>	<b>157 : 192 (82%)</b>	<b>\$2,697,031</b>	<b>\$1,339,155</b>	<b>\$8,530</b>	<b>\$2,650,000</b>	<b>\$1,325,000</b>	<b>298</b>	<b>\$4,992</b>	<b>\$4,443</b>

JUL 19 2005  
 ORACOUNCIL  
 16