

Business Engagement and Services RFP

Goals of the RFP

The City of Oakland, Office of Economic and Workforce Development / Oakland Workforce Investment Board (OWIB) seeks experienced organizations to provide business engagement and other services to businesses under the Workforce Innovation and Opportunity Act (WIOA), with the ultimate goals of:

- Helping adults and dislocated workers develop the skills, attain the knowledge, and access the resources needed to thrive in their careers; and
- Providing employers with the skilled workers needed to sustain and competitively grow their businesses.

OWIB will evaluate all timely submissions in response to this Request for Proposals (RFP) and competitively award contracts to bidders whose submissions are most responsive to the need for services described herein.

Priority Industry Sectors and Career Pathways

OWIB is committed to participating in and advancing regional sector partnerships and strategies. Sector partnerships are regional, employer-driven partnerships of industry, education and training, and other stakeholders that focus on the workforce needs of key industries in a regional labor market. Youth Services providers – along with OWIB and other partners -- will contribute to developing career pathways within priority sectors and connecting students, job-seekers, and businesses to related services and opportunities. OWIB has identified four industry sectors to be prioritized for service strategies under 2016-2019 contracts.¹ These sectors were identified in OWIB's most recent strategic plan and have been validated by regional sector engagement and labor market analysis. Criteria for the selection of priority sectors include total sector employment, projected sector employment growth, and availability of entry-level and mid-level jobs. The OWIB's priority industry sectors are:

- Advanced Manufacturing
- Healthcare
- Information and Communications Technology (ICT)/Digital Media
- Transportation, Distribution, and Logistics

The Business Engagement and Services provider selected through this RFP will coordinate with OWIB staff, the Comprehensive One-Stop Career Center (COSCC), Sector Access Points, Youth Services providers, and regional partners to serve businesses in these sectors and to provide opportunities for job-seekers and workers to enter and advance in careers in these sectors. Bidders for the Business Engagement and Services contract are encouraged to describe collaborative and innovative approaches to aligning with sector initiatives, leveraging resources and strengthening career pathways in OWIB priority sectors, such as:

- Convening employers to identify in-demand skills, competencies, and certifications in targeted sectors;
- Co-hosting sector-focused events;
- Engaging business associations, labor organizations, and others representing priority industries;
- Collaborating with education and training providers to align curriculum and work-based learning with industry need in targeted sectors;
- Using sector data to inform and improve employer engagement strategies; and
- Otherwise coordinating services with regional sector strategies and career pathways.

OWIB's training policy states that "Inasmuch as possible, training services shall be directly linked to occupations that are in demand in the Oakland metropolitan area or in another area to which an adult or dislocated worker receiving training services is willing to relocate. To the greatest extent possible, training should be linked to a career pathway in high-growth sectors that have entry-level and midlevel occupations leading to self-sufficiency." For this reason, the Business Engagement and Services provider will be responsible for identifying employer skill needs in the priority industry sectors, approving training services contracts submitted by the Comprehensive One-Stop Career Center and Sector Access Points, collaborating with Sector Access Points to develop sector-specific cohort-based and customized training, collaborating with Youth Services providers to develop Work Experience opportunities for youth, and ensuring that subsidized training is job-driven and furthers OWIB sector strategies and at least 50% of training funds are spent for training in the priority industry sectors

¹ The West Oakland Job Resource Center (WOJRC) is an established Access Point for the building and construction trades, OWIB's fifth priority industry sector.

BES delivery; dedicates specialized BES staff; and supports the City's and the region's workforce development system with professional services addressing the needs of industry. Bidders are encouraged to refer to effective and evidence-based practices in designing their approach to the service model or models. Several of these practices are referenced in the RFP as examples; bidders are not limited to inclusion of these practices and are encouraged to justify their selection of these and other practices in the proposed service design. Bidders are also encouraged to involve employers, job-seekers, and other community members in program design. Together, the BES provider contracted by OWIB and their partners will deliver a system of coordinated workforce services for Oakland businesses, in partnership with OWIB staff and OWIB-contracted providers of Adult and Dislocated Worker Services and Youth Services. (For additional information, please see Section I, Required and Recommended Partnerships, below.) At the time of the release of this RFP, WIOA guidelines and regulations are forthcoming. Nothing in this RFP is intended to limit the services required to be provided under the WIOA guidelines for the operation and management of services under a WIOA-mandated comprehensive one stop career center or the regulations and guidelines for registration, eligibility and enrollment, basic career services, individualized services, training, tracking, exits, and follow-up; and to the extent not stated in this Scope of Services, those are incorporated by reference.

Contract Period

OWIB anticipates funding contracts for the one-year period from July 1, 2016 through June 30, 2017. Pending performance, compliance, and available funding, each contract will be renewable on an annual basis until June 30, 2019. Bidders are asked to submit budgets for a one-year period.

Funding Availability and Budget

At the time of the issuance of this RFP, OWIB has not been informed of the local WIOA allocation for the 2016-2017 year. OWIB anticipates awarding a single Business Engagement and Services (BES) contract of up to \$275,000 for the 2016-2017 contract year. This amount is subject to change based upon the actual allocation and/or changes approved by the OWIB. Among the responsibilities of the contracted BES provider will be approval of training fund allocations (including Individual Training Account and On-the-Job Training contracts submitted by the Comprehensive One-Stop Career Center and the Sector Access Points) and development with the Sector Access Points of industry sector-specific Cohort-Based Training and Customized Training. However, training funds should not be included in the bidders' proposed budgets. Training funds will be accessed on an as-needed basis through arrangement with the OWIB.

Required Match and Leveraging of Resources

The BES contractor must demonstrate leveraging of non-WIOA resources for the delivery of services to Oakland businesses. Committed or projected cash match equivalent to no less than 15% of the amount requested of OWIB must be included in each bidder’s budget and described in the budget narrative section of the proposal. Cash match is defined as funds at the disposal of the contractor and to be used specifically for BES activities as described in the contractor’s proposal and consistent with the allowable activities of the funding source. Possible sources of cash match include employer or other private contributions, foundation grants, local government contracts, public education funds, and federal grants of non-WIOA funds. Committed cash match must be documented by an attachment to the proposal (e.g., copy of award letter or relevant page of contract document); documentation of projected cash match will be required at the time of contract execution. In-kind, non-cash match will not fulfill the OWIB’s 15% match requirement; it should be referenced in the proposal narrative, as appropriate, but should not be included in the Budget Form or Narrative.

Scope of Services

OWIB is seeking to identify a Business Engagement and Services (BES) contractor to conduct the following activities toward attainment of the goals and measurable objectives defined below:

| Goals | Measurable Objectives | Activities |
|---|---|---|
| Employers are aware of resources available through OWIB’s workforce investment system | Collaborate with OWIB staff to develop and implement an effective outreach and marketing plan to engage employers | <ul style="list-style-type: none"> • Hire/identify staff with expertise in sales and strategic communication • Develop staff knowledge of WIOA, OWIB, and the OWIB network of resources and providers • In Year One, establish BES’ visible presence at a physical location in the City of Oakland (as approved by OWIB) and schedule co-location at the COSCC, Access Points, and Youth Services providers; with a goal of later establishing more regular and integrated presence at the providers • Establish virtual presence, including toll-free number and website • Collaborate with OWIB staff to develop and implement outreach and marketing plan • Assist with Oakland and regional job fairs • Develop relationships with and conduct needs assessment of businesses in OWIB priority industry sectors • Utilize CalJOBS and the region’s customer relationship management (CRM) database to track and disseminate information on employers and employment opportunities • Beginning in Year Two, co-host business-focused events |
| Employers identify and hire workers with the necessary skills | Align training opportunities to meet the needs of employers | <ul style="list-style-type: none"> • Identify training and educational barriers that hinder local hiring and job creation • Facilitate partnerships with educators, training providers and employers to develop and market training opportunities to meet the employment needs of businesses • Broker, design, and market Customized Training |

| | | |
|--|--|--|
| | Connect job-seeker and business services to facilitate placements | <ul style="list-style-type: none"> • Market and connect employers to On-the-Job Training subsidies, in coordination with the COSCC • Actively identify employers with permanent, work experience, and summer job opportunities in priority sectors, and utilize CRM to post job orders • Serve as primary point person re: job orders for COSCC, Access Points, and Youth Services providers • Conduct initial pre-screen of job-ready candidates per job qualifications • Refer appropriate and pre-screened candidates to employers • Maintain employer contact to support job retention • Contribute to development of strong accountability metrics, and track outcomes |
| Regional Collaboration Meets the Needs of Regional Economies | Establish responsive system to meet the needs of priority industry sectors in the region | <ul style="list-style-type: none"> • Contribute to design and customization of the regional CRM database • Gather and synthesize information on business needs and labor market trends, including coordination of labor market studies • Serve as resource to One Stops, Youth Services providers, and regional sector strategies on business needs and labor market trends • Participate and provide leadership – with OWIB staff – in regional sector strategy and career pathway initiatives and development • Facilitate BES-related communication and coordination among providers • Recommend changes to the workforce development system in order to improve employer satisfaction |
| Employers' Service Needs are Met | Develop and implement a comprehensive business services strategy | <ul style="list-style-type: none"> • Build relationships with regional business services providers in order to link business customers to available resources and services, i.e. business start-up assistance, loans, industry roundtables, human resources assistance, etc. • Develop strong partnership and align strategies with the City of Oakland, Office of Economic Development • Refer businesses to a network of services and supports, through required and recommended partnerships (as described in Section II.I below) • Refer and connect businesses to appropriate incumbent worker training • Deliver Rapid Response and Layoff Aversion services to businesses (as described in Section II.G.2 below) |
| Employers Provide Work-Based Learning (WBL) Opportunities that Develop | Encourage business participation in WBL Facilitate WBL | <ul style="list-style-type: none"> • Promote and facilitate sector strategies, career pathways, and apprenticeship programs among businesses • Market opportunities for businesses to coordinate with OWIB, its contracted service providers, and education partners to provide WBL • Identify employers with interest in providing WBL, and utilize |

| | | |
|----------------------|------------|--|
| the Future Workforce | placements | CRM and other means to communicate these to OWIB Youth and Adult and Dislocated Worker service providers and to education partners |
|----------------------|------------|--|

The Business Engagement and Services (BES) contractor will work in close coordination with OWIB staff to achieve the goals and objectives stated above. In Year One, the contractor and OWIB staff will define policies and procedures related to the BES function, referral mechanisms, and integration with Adult and Youth Services. The BES contractor and OWIB staff will also work to establish on-line systems, including contributions to the development of the region’s CRM database and protocols. Specific deliverables related to the scope of services will be defined in contract negotiations. In Year One and subsequent years, the BES contractor and OWIB staff will work together to continuously adapt a business engagement and services function that is responsive to the changing needs of industry and the regional economy.

Bidders must describe strategies that will be employed to effectively conduct the activities and achieve the goals and measurable objectives described above. Bidders are encouraged to involve employers, job-seekers, and other community members in program design. Bidders are also encouraged to refer to effective and evidence-based practices in designing their approach to the service model or models.

Rapid Response/Layoff Aversion Services

Rapid Response Services, as mandated by the EDD Directive WSD14-3, are services delivered to businesses and employees of companies that are experiencing downsizing through layoffs or closure and may have also been impacted by a Worker Adjustment and Retraining Notification (WARN) issued by the State of California. These services include, but are not limited to, on-site contact with employers, representatives of the affected workers (including labor unions), and the local community, providing information on and facilitating access to: appropriate short- and long-term resources for finding new jobs and/or upgrading skills; assistance with applications for Unemployment Insurance; and job search workshops and other needed group intervention activities.

The Business Engagement and Services (BES) contractor will serve as the lead and primary contact for businesses issuing WARN notices, in conjunction with the activities of the City of Oakland’s Department of Economic and Workforce Development Agency (DEWD) Economic Development staff. BES will coordinate layoff aversion and rapid response services and convene partners to provide those services. If requested, the Comprehensive One-Stop Career Center (COSCC) and the Sector Access Points will be responsible for providing Rapid Response Services to employees of these businesses. Services that may be requested by BES and provided by the COSCC and Sector Access Points include:

- Review affected workers’ assistance needs.
- Coordinate and conduct Rapid Response workshop presentations to assist with career transition, job search tools and skills, résumé preparation, and interviewing techniques.
- Assess re-employment prospects for workers in the local community, working in collaboration with the WIB’s Business Engagement and Services contractor.

- Provide information on resources to meet the short and long-term needs of affected workers.
- Establish a process of referring affected employees to the COSCC, Sector Access Points, and other OWIB resources.

OWIB's BES contractor will deliver comprehensive engagement and layoff aversion strategies and activities for businesses in transition in order to prevent or minimize unemployment. These services include:

- Ongoing engagement, partnership, and relationship-building activities with businesses, in order to create an environment for successful layoff aversion efforts;
- Providing assistance to employers in managing reductions in force, which may include early identification of firms at risk of layoffs, assessment of the needs of and options for at-risk firms, and the delivery of services to address these needs;
- Immediately contacting an affected employer, workers or their representatives, and the local community, to assess the layoff situation and develop a strategy to address it;
- Convening service partners, such as the Comprehensive One-Stop Career Center and appropriate Sector Access Points, to deliver services to affected businesses and workers;
- Connecting businesses to resources such as loans, business assistance programs, market analyses, and economic development activities to address needs and prevent layoffs;
- Connecting businesses and workers to short-term, on-the-job, or customized training programs and apprenticeships before or after layoff;
- Developing systems and processes for identifying and gathering information for early warning of potential layoffs or opportunities for layoff aversion;
- Analyzing, and acting upon, data and information on dislocations and other economic activity in the state, region, and local area;
- Developing and maintaining partnerships with other Federal, State and local agencies and officials, business associations, technical councils, industry councils, labor organizations, and other public and private organizations, as applicable.
- Tracking outcome and performance data and information related to the activities of the Rapid Response program.

Training Services

The Comprehensive One-Stop Career Center (COSCC) will partner with the contracted Business Engagement and Services (BES) provider to administer Individual Training Accounts (ITAs) for Adults and Dislocated Workers. ITAs will be assigned to eligible, WIOA-enrolled customers according to their Individual Career Plans. The COSCC will provide customers with information about training providers on the Eligible Training Provider List to inform the choice of training. The COSCC will also assess participant skills, interests, and readiness for training to ensure appropriate referrals to training services, which must be approved by the BES provider. The COSCC will secure and maintain on file all necessary paperwork related to the ITAs and will coordinate with OWIB staff, the BES provider, and the contracted Sector Access Points to assure the strategic use of ITAs within priority industry sectors. *At minimum 50% of ITAs will be applied toward training leading to credentials in OWIB priority sectors.*

The COSCC will also partner with OWIB's BES provider to administer On-the-Job Training contracts (OJTs). OJTs will be allocated to employers identified by the BES provider that are committed to meeting WIOA requirements and delivering high-quality on-the-job training to enrolled individuals. OJTs will be assigned to eligible, WIOA-enrolled job-seekers and workers according to their Individual Career Plans. The COSCC will assess participant skills, interests, and readiness for training to ensure referrals to appropriate OJT opportunities, which will be administered by the BES provider. The COSCC will also secure and maintain on file all necessary job-seeker and worker paperwork related to the OJTs and will coordinate with OWIB staff, the BES provider, and the Sector Access Points to assure the strategic use of OJTs within priority industry sectors.

The COSCC will coordinate with OWIB staff, Sector Access Points, and the Business Engagement and Services contractor to facilitate customer access to WIOA-funded cohort-based training delivered by the Access Points and Customized Training administered by the Business Engagement and Services contractor. The COSCC will demonstrate regional partnerships with providers of the full range of training services needed by clients to enter and advance along career pathways, with an emphasis on OWIB priority industry sectors.

Marketing

The Business Engagement and Services contractor will conduct outreach and marketing activities with the goal of informing businesses – particularly those in OWIB priority industry sectors – about services available through BES and its partners. Outreach and recruitment methods may include phone calls, site visits, formal advertising, electronic media, flyers, brochures, word-of-mouth and other methods of dissemination. The BES provider must ensure that the outreach and recruitment is coordinated with Adult and Dislocated Worker and Youth Services providers, as well as OWIB staff. All outreach and recruitment materials must feature approved OWIB branding and must be approved by the City as System Administrator prior to publication.

Location of Services

OWIB's contracted Business Engagement and Services (BES) provider will represent OWIB in a variety of community settings, at the Oakland Small Business Assistance Center, at the Comprehensive One-Stop Career Center (COSCC) and Sector Access Points, at Youth Services facilities, at employer locations, and virtually.

The BES contractor must establish a physical presence at a location within the City of Oakland and branded as OWIB's BES location. The bidder is asked to propose a physical location in the proposal narrative. Possible locations include the City of Oakland's Small Business Assistance Center, co-location with another OWIB contractor or partner, or at the contractor's own facility. Selection of the BES location will be subject to OWIB approval.

The contractor's Business Engagement Liaison(s) must establish co-location agreements with the COSCC, each Sector Access Point, and – as appropriate – each Youth Services provider. OWIB staff will facilitate dialogue among the system providers to determine the most mutually beneficial co-location strategies for the system.

The BES contractor also must establish a virtual presence that is branded as OWIB's BES and approved by OWIB. This must include a page on the OWIB website created and maintained by the contractor, as well as an active social media presence. The contractor must also maintain a toll-free phone number that is available to businesses with interest in or in need of services. The bidder is asked to describe a plan to meet these requirements in the proposal narrative.

Businesses to Be Served

The Business Engagement and Services (BES) contractor will serve primarily Oakland businesses. Outreach, marketing, and engagement of businesses in the larger East Bay region may occur in fulfillment of regional sector strategies.

The BES contractor will target small, medium and large businesses in OWIB's priority industry sectors (see Section I.G above) in accordance with OWIB priorities and strategies and in collaboration with the Sector Access Points. The BES contractor will support the Comprehensive One-Stop Career Center's engagement of out-of-sector businesses in response to individual job-seeker needs; however, this will be limited to the sharing of marketing materials and alignment of strategies, while the BES contractor's direct engagement and services will be focused on OWIB's priority industry sectors. However, the BES will respond promptly and provide high-quality service to businesses from *all industry sectors* who contact it seeking services.

Staffing Structure

The WIB requests that Business Engagement and Services (BES) bidders describe in their proposal a proposed staffing structure for the delivery of the solicited services. The WIB recommends a structure that aligns with the following distribution of functions and job responsibilities:

- Business Services management staffing: In close coordination with the OWIB manager of strategic regional initiatives, participate in strategic and regional work to advance the OWIB's business services goals. Supervise business engagement staff, and oversee overall contract compliance at attainment of performance outcomes.
- Business engagement liaisons: In close coordination with Comprehensive One-Stop Career Center, Sector Access Point, and Youth Services staff, conduct transactional employer engagement, outreach and marketing, identification of job leads, information and referrals, coordination of job fairs and hiring events, brokering of training, and pre-screening of job candidates. Specialize and focus employer engagement in OWIB priority sectors, and coordinate activities with other regional and City counterparts serving these sectors.
- Administrative/finance staffing: Administer and support BES activities.

BES staff must be highly familiar with and experienced in the local business community, and able to demonstrate a high level of proficiency in interacting with and marketing services to businesses. Staff

with prior expertise related to OWIB's priority industry sectors are strongly recommended. Bidders are encouraged to describe a commitment to staff development and training, both to maintain the high quality of direct business services and to ensure an exceptionally coordinated and integrated workforce system of Adult and Dislocated Worker, Youth, and Business Engagement and Services aligned with priority industry sectors.

Performance Measurement and Accountability

WIOA establishes core performance measures for Adult and Dislocated Worker services (including Title II, Title III, and Title IV) and Youth Services; a business-services-related measure is expected to be developed. WIOA performance measures are designed to measure the effectiveness and continuous improvement of the workforce service delivery system, and the contracting agency will be required to collect and report data pertaining to these measures. Performance measures are subject to change at any time, and the OWIB may set performance benchmarks or implement additional measures in response to regulations or local need.

A measure of effectiveness in serving employers (such as employee retention rates, rates of repeated employer use of program, and share of all employers in a labor market served) is expected to be developed and implemented by the U.S. Department of Labor (USDOL) by July 2016. USDOL's [Notice of Proposed Rule-Making](#) also considers tracking of supplemental customer service indicators; [the Aspen Institute Workforce Strategies Initiative has also suggested possible business engagement and services performance measures](#). Additionally, the OWIB develops local performance measures and will set specific targets to evaluate Adult and Dislocated Worker Services providers' effectiveness at serving local populations.

The BES contractor will be responsible for providing business client and program data under policies and guidelines established by WIOA, OWIB, the State of California and the federal government, and administered by the City of Oakland. It will be the contractor's responsibility to ensure on-going staff expertise and cooperation with data management requirements. The contractors will be required to:

- Utilize a customer relationship management (CRM) database and other data management systems as specified by OWIB to track and report on activities;
- Ensure complete, accurate and timely data entry in compliance with WIOA;
- Report performance measurement information, including data on WIOA employer services performance measures yet to be defined;
- Prepare monthly and quarterly performance reports as required by WIOA and as may be requested by City staff, OWIB, and OWIB committees;
- Prepare monthly financial and training expenditure reports, along with supporting documentation as required by the City.

OWIB staff will monitor, audit, and evaluate program activities throughout the funding period. The BES contractor must allow OWIB staff access to all files and records relating directly to WIOA funds, including database records, fiscal documents and other related records.

Evaluation of Proposals

Proposals will be evaluated according to the following criteria:

| Criteria | Maximum Point Value |
|---|---------------------|
| <p>Organizational Experience and Capacity</p> <ul style="list-style-type: none"> • Application must provide evidence that the applicant and its required partners have the fiscal, administrative and performance management capacity to administer funding streams. Scoring under this criterion will be based on the extent to which applications provide: <ul style="list-style-type: none"> ○ Ability to manage and maintain fiscal records, including experience with federal funds and cost allocation. ○ Adequate and qualified staff ○ Capacity to track required deliverables and generate the required reports • Mission, history, accomplishments • Organization structure and staffing (see Org Chart) • Relevant programs and services, and their recent outcomes • Administrative and data management experience and capacity • Fiscal management experience and capacity • Facilities • Experience related to OWIB system and providers • Summary information on proposed subcontractors | 15 |
| <p>Program Description</p> <ul style="list-style-type: none"> • Proposal must demonstrate that the applicant has experience serving target population. Applicant must provide program evaluations or reviews and previous contract experiences. • Summary • Target population, outreach and marketing plan • Effective strategy to recruit eligible participants • Proposed client services and flow (see Client Flow Chart, Service Elements Delivery Plan) • Description of follow-up services and tools to measure customer satisfaction. • Proposed sector strategies and business engagement • Proposed Work Plan and Timeline (see attached) • Previous contract experience • Innovative approaches | 20 |
| <p>Existing and Proposed Program Staffing</p> <ul style="list-style-type: none"> • Roles and experience, by position (see attached Resumes, Job Descriptions) • Training plan | 5 |
| <p>Subcontractors and Other Partners</p> <ul style="list-style-type: none"> • Proposed subcontractor capacity, experience, and ability to contribute to performance outcomes (see attached Letters) • Partnerships with OWIB system providers • Contributions of other proposed partners (see attached Letters/MOUs) • Partnerships with employers | 15 |

| | |
|--|------------|
| <p>Outcomes, Data Collection, Reporting and Monitoring</p> <ul style="list-style-type: none"> • Proposed performance outcomes (see attached), including justification if not consistent with past/current performance on similar contracts • Proposed data collection systems and procedures • Proposed quality assurance and monitoring of subcontractors • Proposed evaluation and continuous improvement strategies • Past/current performance on similar contracts (see Past/Current Contracts Form) • Proposal demonstrates provider understands WIOA performance measures. | 25 |
| <p>Budget and Budget Narrative</p> <ul style="list-style-type: none"> • Applicant must show a strong understanding of WIOA financial procedures and fiscal management. Scoring criteria for this section will be based on the following categories: <ul style="list-style-type: none"> ○ Description of process to support proposed activities with sufficient project operational budgets. ○ Description of fiscal management experience and the use of fiscal controls. ○ Describe budget justification and demonstrative sufficient understanding of WIOA cost definitions and cost reimbursement contracts. • Budget Form • Budget Narrative, including: <ul style="list-style-type: none"> ○ Justification of costs ○ Sources of non-WIOA funds, including whether proposed or confirmed | 20 |
| TOTAL | 100 |