



ORANGE COUNTY
Workforce Investment Board



Request for Proposals
LABOR MARKET RESEARCH PROJECTS
Program Year 2004/2005

BIDDER'S CONFERENCE
PROPOSAL DUE DATE

April 29, 2004
May 24, 2004

An Equal Opportunity Employer
Auxiliary Aids and Services are Available Upon Request to Individuals with Disabilities

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INTRODUCTION

The Orange County Workforce Investment Board (OCWIB) is issuing a Request for Proposals (RFP's) from qualified organizations or individuals to provide a labor market needs assessment and research reports that will continue the analysis of existing and new Orange County specific workforce data as well as outline specific interventions that support the strategic planning workforce goals of the Orange County Workforce Investment Board. Outcomes from proposed market research projects will be used in addressing local and regional workforce, training, education and economic development issues by academics, businesses, job seekers, and youth.

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BACKGROUND

The Orange County Workforce Investment Board (OCWIB) is the governing board that oversees the implementation of workforce development programs for the County of Orange except for the cities of Anaheim and Santa Ana, which have their own workforce investment boards. The majority of the Board members are business leaders in the Orange County community who are selected by the Orange County Board of Supervisors. The balance of the board members consists of representatives of labor, education, economic development, social services, community-based organizations, and rehabilitation agencies as well as other local interests.

In today's rapidly changing, global economies, Workforce Boards across the nation face a myriad of workforce development challenges. Workers do not always know how to access information about career opportunities and career paths and many industries have difficulty finding qualified workers with the right sets of skills and then do not always have the career path opportunities to train and retain the workforce. The workforce development system and the one-stop centers, critical to responding to these issues, struggle to understand the needs of the various industries and to respond to the accelerated rate of change in the labor market. The overriding aim of the OCWIB is to drive the continued economic and social vitality of the Orange County region by building a workforce system that prepares people for well-paying jobs with a future and meets the skilled workforce needs of industry.

BIDDER'S CONFERENCE

A bidders conference is scheduled to explain the application and review process. The meeting will last approximately 1-2 hours. The date and the location is as follows:

April 29, 2004

10 a. m.

ORANGE COUNTY COASTAL REGIONAL ONE-STOP CENTER

1675 SCENIC AVE.

COSTA MESA, CA. 92626

714-241-4900

RFP INFORMATION

All questions, interpretations or clarifications desired shall be requested in writing not less than eight calendar days prior to the Closing Date and Time for Receipt of Proposals. Oral statement(s) concerning the meaning or intent of the contents of this RFP by any

person are unauthorized and invalid. All questions and inquiries related to this RFP must be directed to, Mark Mathews, Workforce Analyst, 1300 S. Grand Ave., Santa Ana, CA 92705, email: mark.mathews@csa.ocgov.com, Telephone: 714-567-7548, Fax: 714-834-7132. In the event the County deems it necessary to clarify or make any changes to this RFP, these changes shall be made by written addendum authorized and issued by the Housing & Community Services Agency/Special Programs Division contracts staff or authorized designee and will be available on the internet by approximately May 11, 2004 by accessing: www.ocwib.org.

Note: Interested parties are expected to have email, internet and computer capabilities, since the County intends to use these technologies to facilitate communications regarding this RFP process and the operation of any programs funded through this RFP activity.

The RFP will be able via two sources, i) it may be downloaded from www.ocwib.org in Adobe Acrobat pdf file or word format, or ii) upon request the pdf file will be made available on a MS DOS formatted, 3 1/4" diskette. Please email your request to OCWIB Staff at: mark.mathews@csa.ocgov.com. The Adobe Acrobat pdf file is read by using and installing the free Acrobat Reader, downloadable from www.adobe.com/acrobat. Versions for DOS, Macintosh and Unix operating systems are available.

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All responses to the RFP must be submitted in writing according to the instructions contained herein. We thank you in advance for your time and effort and look forward to reading and reviewing your proposal(s).

PURPOSE OF REQUEST FOR PROPOSAL AND OBJECTIVES

The OCWIB is seeking qualified organizations or individuals to gather accurate and timely baseline data about the Orange County labor market and economic environments through a variety of data gathering methods, including mining existing databases, collecting local administrative data, and conducting employer survey research to meet the following objectives:

1. Refine and update the Orange County Workforce: State of the County 2003 report prepared by the Orange County Business Council with a focus on three defined growth industry clusters.
2. Conduct a comprehensive employer survey that contains descriptive and statistical occupational information on the current Orange County labor market with emphasis on the Biomedical, Computer Software, and Business and Professional Services growth industry clusters identified in the 2003 Orange County Workforce Report.
3. Convert researched labor market information into customer-friendly, professional brochures or informative flyers for use throughout the Orange County One-Stop System.

These objectives will address both local current economic trends and workforce development issues raised by the following OCWIB funded research documents processed between 2002-2003:

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- Orange County Workforce: State of the County 2003-Orange County Business Council
- 2002 Survey of Employers Report-Godbe Research & Analysis Corporation
- 2003 County of Orange Occupational Outlook Report-OCWIB
- 2002 Early Warning System-Orange County Business Council
- 2004 NAICS2002 Industry Clusters Definitions-Orange County Business Council

Additional information regarding these research documents is detailed in Exhibit D. Access to the documents can be obtained at www.ocwib.org. Proposals may address all of these objectives within a single coordinated program or a proposal may focus on a single objective, with a stated willingness to coordinate with other objective proposers. Collaboration and partnered bids are encouraged.

PROJECT AND SCOPE

OCWIB is seeking proposals to complete a comprehensive, three objective labor market project. The OCWIB and other workforce stakeholders will use the results of this research to facilitate innovative workforce development strategies, programs and research project information through the One Stop center system. The County intends to enter into a cost reimbursement contract with the successful bidder(s) for one-year, renewable for up to two additional years. Bidder(s) submitting proposals will address the project scope relevant to the specific objective(s) bid upon.

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Objective 1

Refine and update the 2003 Orange County Workforce Report prepared by the Orange County Business Council, with special emphasis on three (3) selected industry clusters; Business and Professional Services, Biomedical, and Computer Software.

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Scope:

In 2002/2003, the Orange County Workforce Investment Board (OCWIB) commissioned a special labor market study: Orange County Workforce: State of the County 2003 to help identify specific workforce needs of Orange County business. The 2003 report is the result of a strong partnership between business, government and education in Orange County in promoting workforce initiatives that benefit employers, workers, and the local economy. The report addresses the significant long-term workforce needs of Orange County's fastest growing industry clusters and major employers. The primary goal of the report is to help the OCWIB administer its workforce investment and economic development programs in a more efficient, collaborative manner, and to foster the development of a seamless system of service delivery that will enhance access and improve long-term training and employment outcomes for both OCWIB constituent customer groups: individuals needing training and assistance in obtaining employment and Orange County employers needing a qualified, skilled workforce. The current workforce report outlines cluster indicators, why it is important, and how is Orange

County doing in sustaining their growth. A electronic copy of the Orange County Workforce report may be accessed through www.ocwib.org.

Deliverables:

The successful bidder will provide information and recommendations for fostering industry cluster growth in Orange County, and supplement and update the 2003 Orange County Workforce Report with recently published Orange County demographic and economic data, especially using the new N.A.I.C.S. and ONET-SOC industry and occupational classification systems. Other sources as may be appropriate should also be included. In addition to a general update of the 2003 Orange County Workforce Report, specific information on each of the 3 selected industry clusters; Business and Professional Services, Biomedical, and Computer Software must be provided as follows:

- Provide updated statistical data.
- Identify the needs of job seekers, displaced workers, and new entrants, with a special emphasis on those entering the labor force with only a high school diploma or less qualification.
- Identify short or mid-term training resources available to assist low skill job seekers in seeking employment.
- Identify key skill areas of need for education and training for business growth.
- Identify partnerships needed between suppliers of skilled labor and business users.

The updated Orange County Workforce Report and specific information on the three selected industry clusters must be delivered in both digital format, Word or Word compatible, and in hard bound copies.

Objective 2

Conduct a comprehensive employer survey that contains descriptive and statistical occupational information on the current Orange County labor market with emphasis on the three identified clusters. (1) Business and Professional Services, (2) Biomedical and (3) Computer Software industry clusters, identified in the 2003 Orange County Workforce Report.

Scope:

Objective 2 seeks a employer survey focused on the three indetified industry clusters. The intiital survey and report of these clusters was conducted by Godbe Research & Analysis Corporation in 2002. This survey provides extensive employer information related to the ten industry clusters including indicators of cluster growth trends, listing of occupations within cluster sectors, turnover rates, and projected job openings. Bidders may access this report at: www.ocwib.org.

The successful bidder will be required to conduct a telephone survey of all business in the three defined growth industry clusters with ten (10) or more employees, which have been identified in the Orange County Workforce: State of the County 2003 report as key industries critical to the economic vitality of the county.

The 2002 Cluster Employer survey of 21,700 employers with ten or more employees, identified 2,197 businesses in the Professional and Business Services cluster, 484 businesses in the Biomedical cluster and 401 businesses in the Computer Software cluster. Representing nearly 3,100 employment establishments in the three defined clusters. The project scope is assumed to have equivalent numbers of employers in the database universe of ten plus employers and corresponding clusters.

The focus of the survey questionnaire will be to determine the leading occupations for each of the defined clusters. The survey questionnaire should have a core job seeker and employer relevant series of questions, as used in the 2003 Orange County CCOIS Occupational Outlook Report. The 2002 Cluster Employer survey identified 31 major occupations in the three defined clusters. (See attached Appendix 1). The specific occupations to be surveyed will be determined by the successful bidder and OCWIB staff. The survey questionnaire will have both questions specific to the defined occupations in each of the three clusters and will provide data to determine cluster dynamics, employer awareness of local employment training programs, local labor market conditions, and attitudes regarding employing participants of local training programs. It is the expectation that the employer survey will provide information about the area's industries, firms and occupations.

The survey should include the following information for the defined occupations within the specific industry growth cluster using that occupation:

- Entry and Experienced salaries and education and skills requirements for these occupations.
- What is the career path for workers in this occupation?
 - 1) Entry level?
 - 2) Intermediate level positions?
 - 3) Possible advancement to?
- Demand data for the occupations.
- Anticipated hiring and layoff information.
- Anticipated turnover rates.
- What is the usual way of learning of this occupation? (On-the-job-training, School training program, or other – specify)
- Identify the knowledge and skills needed to be successful in those jobs; and
- Identify the educational programs and training activities required to develop a skilled workforce to fill those jobs.

Bidders should provide a draft of a proposed questionnaire covering the above items. The precise questionnaire format will be finalized between successful bidder and OCWIB staff. Bidders are encouraged to both collaborate with EDD/LMID research staff in objectives requiring NAICS2002 industry conversions and ONET/SOC occupational

coding information and use the following three labor market research documents as informational guides in developing the employer survey:

- 2003 County of Orange CCOIS Occupational Outlook Report
- 2002 Early Warning System Report
- 2004 NAICS2002 Industry Clusters definitions-Orange County Business Council

Each of the documents listed above can be accessed at www.ocwib.org.

Deliverables:

The cluster employer survey report content is detailed below, and should include a brief summary of findings, labor market data trend updates and recommended responses to predicated workforce changes. The report shall be drafted in a format that can be easily read and delivered in both hard copy and digital format with charts and graphics.

The successful bidder will be required to:

- Conduct a telephone survey of business establishments within the Professional and Business Services, Biomedical and Computer Software industry cluster firms with ten (10) or more employees in the Orange County area.
- Provide an electronic copy of the basic database of an estimated 20,000 Orange County employers with ten or more employees to be used for the survey. This database should include for each individual establishment:

Employer street address, city, zip, phone number, estimated employment range and NAICS2002 classification. (Conversion from SIC87 will probably be required to be processed by bidder).
- Provide a comprehensive electronic file of the survey of the three defined growth industry clusters occupational questionnaire results database.
 1. Employer survey response rate should be targeted as close as possible to 50% for employers with 50 or more employees, the overall response rate being greater than 30%.
 2. A target as close as possible or greater than fifteen responses for each of defined cluster occupations is proposed.
 3. Provided database(s) should indicate which employer provided which response/non-response to occupational and general growth cluster questions.
- The electronic file should be accompanied by electronic documentation of:
 1. Database field notations and structure.
 2. Individual employers responses and non-responses to the survey.

3. NAICS2002 classification for all defined cluster employers, including non-responding employers.
 4. Employment (full and part-time) at each individual cluster establishment, including non-responses.
 5. Responses specific to the surveyed occupations, including a summary of the total employers using the defined occupation.
- Prepare an occupational and industry cluster report and summary report describing the Orange County labor market with emphasis on the three defined industry growth clusters and a occupational profile consistent with the format used by the 2003 County of Orange CCOIS Occupational Outlook Report. (An electronic copy this report can be accessed at www.ocwib.org.)
 - Identify the types of education and workforce training programs and services needed to meet the workforce needs of employers in the targeted industry clusters.
 - Be part of a team responsible for forming coalitions and working with those coalitions to develop a plan of action for education, workforce and economic development.
 - Conduct on a quarterly basis a Powerpoint presentation of select industry cluster information to the OCWIB.

Objective 3

Convert researched labor market information into customer-friendly, professional brochures or informative flyers for use throughout the Orange County One-Stop System.

Scope:

Currently, Orange County's one-stop system consists of One-Stop centers, Business Services Centers, and youth programs. These One-Stop system sites offer staff assistance to individuals accessing employment-related information and services such as job placement services, labor market information, and referrals to appropriate agencies and comprehensive assessment. One-Stop sites also provide individuals with access to resource rooms consisting of public access computers and handouts in order to allow individuals to access the one-stop system through self-service methods. A key goal of the One-Stop system is to provide timely, relevant and accessible labor market information data to system participants. Bidders are encouraged to provide innovative methods of converting the research conducted on the workforce report and employer survey objectives into customer-friendly, professional brochures or informative flyers for use throughout the Orange County One-Stop System.

Deliverables:

Successful bidder(s) shall provide a series of brochures or informational flyers that will be geared towards each of the following three different audiences:

- Job Seekers (Maximum of an eighth grade reading/writing competence)

- Youth (Maximum of a 7th grade reading/writing competence)
- Employers
- The bidder(s) shall work with OCWIB staff to develop a format conducive to sharing information with the three targeted customer groups.
- All brochures or informational flyers shall be provided in English, Spanish and Vietnamese.
- All printed material shall also be converted into PDF format, while maintaining professional formatting, and shall be provided to the County on CD Rom(s).

Minimum information on the brochures/information flyers shall include:

- Entry level skills and/or minimal to no education requirements
- Medium level skills and/or education requirements
- High level skills and/or education requirements
- Information on local, state, and national salary data of identified industry clusters occupations

The County reserves the right to accept items using alternate publishing software if it is in the best interest of the County.

DELIVERABLES REQUIRED FOR ALL OBJECTIVES BID:

All proposed activities must include identified timeline for deliverables. Research activities that utilized all current technologies to improve efficiencies are strongly encouraged. Bidders may bid on one, two or all three of the objectives listed in this RFP.

FUNDING

The initial amount of WIA program funds available for all of the objectives in total for this solicitation is **\$100,000**. This amount is subject to change without notice to bidders submitting proposals.

BUDGET

Two (2) versions of the budget must be presented:

BUDGET BY COST CATEGORIES

This shall include:

- Personnel costs* broken down by each person working on the project, the amount of time each person will dedicate to the project, and the total cost for that person's participation.
- Non-personnel costs* broken down by line item, including, but not limited to, material, delivery, travel, and subcontract costs.

BUDGET BY DELIVERABLES

This section should show a schedule of deliverables and the date each deliverable will be provided to OCWIB. The schedule of deliverables should include all of the activities and

products (including monthly reports and draft products) described in the Proposer's work plan.

Estimated RFP Timeline:

Issue date: April 23, 2004
Bidder's Conference: April 29, 2004
Proposal Due date: May 24, 2004 by 3:00 P.M.
OCWIB Recommendation: June 18, 2004
Board of Supervisors Approval June 29, 2004
Contract Dates: July 1, 2004-June 30, 2005

**LABOR MARKET PROJECTS
REQUEST FOR PROPOSALS**

**EXHIBIT A
PROPOSER INFORMATION**

Proposers are required to respond to the information requests in the order listed in this section so that OCWIB may evaluate all proposals on an equal and timely basis. Additional information may be provided in attachments.

1. Legal name of firm, street address, telephone number, facsimile number, and state of incorporation of partnership (if applicable).
2. A brief company history.
3. Number of years in business as the currently-named firm.
4. Number of years in which proposer has provided labor market research projects and the name(s) and number of clients.
5. Describe experience in conducting large-scale labor market surveys.
6. Provide a staffing plan for conducting the project and demonstrate the relevant expertise and experience of the proposed project team. Include a brief description of the relevant experience and qualifications of each member of the proposed project team.
7. Provide sufficient descriptions and literature to convey a clear idea of the methodology used to conduct labor market surveys and the provisions to maintain the integrity of the confidential employer resources.
8. Provide a Work Plan and Implementation Schedule outlining, for each objective, the related activities, responsible party and timelines.

**LABOR MARKET PROJECTS
REQUEST FOR PROPOSALS**

**EXHIBIT B
PROPOSAL SELECTION/EVALUATION CRITERIA**

SELECTION PROCESS:

OCWIB staff will screen all proposals for completeness and compliance with the terms and conditions of the Request for Proposals (RFP). In the selection and award of services procured under this RFP, the Orange County Workforce Investment Board shall ensure that any award will be made only to responsible proposers who have demonstrated ability to perform based upon delivering comparable or related services.

CONTRACT AWARD

Contracts will be finalized following the selection process conducted by the Orange County Workforce Investment Board and approval by the Orange County Board of Supervisors. Each proposal should be submitted in the most favorable terms, from a price and technical standpoint, which the proposer can make. However, the Orange County Workforce Investment Board and/or County reserves the right to request additional data, oral discussion or presentations in support of written proposals.

PROPOSAL EVALUATION CRITERIA:

It will be understood and accepted by the proponent that all decisions and the degree to which a proposal meets the evaluations criteria and the overall needs of the OCWIB are within the purview and judgement of the OCWIB and the Orange County Board of Supervisors. A review panel will evaluate all proposals, which pass the initial compliance review. Final scores shall be tallied and proposers who receive the top scores shall be recommended for placement on the vendor list.

Each reviewer will independently review and score proposals on a 100-point scale using the following assigned weights:

Project Concept

50 Total Points

Will the proposed methodology produce the desired labor market information specified in the Request for Proposal? (30)

Has the bidder demonstrated its ability to provide written reports at the level of quality specified in the RFP? (10)

Does the bidder's project plan appear reasonable? (10)

Organizational Qualifications and Expertise

30 Total Points

Does the Proposer have the experience and knowledge to conduct large-scale labor market information research projects? (15)

Does the bidder have experience producing tables and reports? (5)

Will the staffing plan developed for the project meet the project's needs? (This includes both staff responsibilities and staffing structure.) (5)

Do members of the project team have the skills required for the project and their particular assignments? (5)

Budget

20 Total Points

Does the Proposer provide a budget showing cost categories as specified in the RFP (10)

Does the bidder provide a budget by deliverables with dates of completion as specified in the RFP? (5)

Do the costs shown in the budgets appear reasonable for the work being performed? (5)

**LABOR MARKET PROJECTS
REQUEST FOR PROPOSALS**

**EXHIBIT C
PROPOSAL FORMAT/GENERAL INFORMATION**

1. All proposal responses must be typed in 12-pitch size, using an Arial or New TimesRoman font with 1.5 line spacing. Proposal response should be no more than 20 pages in length.
2. Provide 1 original and 6 copies of your proposal response. All copies and the original are to be one sided.
3. Original and copies must be submitted in separate loose-leaf binders.
4. OCWIB will not return proposal responses, binders or exhibits to proposers.
5. Respondents may be asked to give an on-site presentation regarding their labor market project proposal before contract award is made.
6. Proposers are asked to designate an Internet email address on their proposal cover sheet. Please notify the OCWIB in writing at the time your organization receives a copy of the RFP package if you cannot receive messages via e-mail.
7. Proposers must use the budget sheets provided which are in a table format, and must be signed by an officer, director, or authorized signatory that certifies that the budget is a true estimate based upon available information at the time of its submission.

WHO CAN APPLY

8. Private and public, for-profit and not-for-profit agencies, Community Based Organizations, Faith-based organizations or other entities are eligible to respond to this RFP. Respondents are responsible for familiarity with labor market research, workforce development, and education and training systems and applying their expertise in developing the RFP response.
9. The County of Orange does not require and neither encourages nor discourages the use of lobbyists or other consultants for the purpose of securing business.

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ADMINISTRATIVE REQUIREMENTS

10. The proposal that is selected becomes part of the contract between the County of Orange and the vendor, and as such becomes public record. If your proposal contains any confidential information, that information must be removed from the body of the response and placed in an Appendix. The Appendix will be referenced

by the contract, but will not be available for public viewing. The entire proposal cannot be held confidential; you must be very specific in your designation.

11. All material will be retained by the County of Orange. We reserve the right to reject any or all proposals and to award and contract as is in our best interest. We reserve the right to solicit additional information from any responding vendor after the proposals have been received, including the requesting of systems demonstrations by vendors.
12. This announcement and its attachments are an RFP and are an invitation for prospective firms to respond. Although this solicitation is in RFP format and we will adhere to FRP conventions, we expressly intend that the procurement of this labor market research projects service and supporting system is a professional service and as such we are not bound solely by the lowest price.
13. This RFP does not commit the OCWIB or the County of Orange to award a contract, pay any costs incurred in the preparation of a proposal to this request, or to procure or contract for services and supplies.
14. The County reserves the right to accept or reject any or all proposals received as a result of this request, or to cancel in part or in its entirety this RFP if it is in the best interest of the County to do so.
15. Proposers will be required to list the State of California, the OCWIB and Orange County as additional insureds on their general liability, umbrella and fidelity bond insurance policies. If there is a fee for adding the OCWIB and Orange County to proposer's policies, include the cost in the proposed budget.
16. Proposers may be subject to a pre-award survey and reference checks. Costs will be compared with pre-bid estimates collected by OCWIB staff. This may include but not be limited to a review of proposer's record keeping procedures, management systems, accounting and administrative systems.
17. All proposals may be subject to negotiation following selection by the OCWIB. Proposals which cannot be successfully negotiated will not be funded.

CONTRACT TERMS AND CONDITIONS

18. Contract term will start from contract execution to June 30, 2005.
19. The Contractor agrees to deposit with the County prior to the provision of services under this Agreement, Certificates of Insurance, including all endorsements required herein necessary to satisfy the County that insurance provisions of this Agreement have been complied with, and to keep such insurance and the certificates there for on deposit with the County during the entire term of this Agreement.

The policy or policies of insurance maintained by the Contractor shall provide the minimum limits and coverage as set forth herein below:

Coverage

Commercial General Liability to include a Broad Form Property Damage Endorsement and Contractual Liability

Minimum Limits

\$1,000,000 combined single limit per occurrence

\$2,000,000 Aggregate

Automobile Liability including all owned non-owned and hired vehicles

\$1,000,000 combined single limit per occurrence

Workers' Compensation

Statutory

Employer's Liability

\$1,000,000 per occurrence

Required insurance information/documentation should be forwarded to:

Orange County Workforce Investment Board

1300 South Grand, Building B
Santa Ana, CA 92705
Attention: Contracts & Procurement

PROPOSAL BUDGET

20. Proposers must complete the Budget section of the proposal using the form provided in this package (See "Attachment A")

PROPOSAL DUE DATE

21. Proposals must be received and date-stamped by OCWIB staff by **3:00 PM. May 24, 2004.** Proposals submitted after the closing date and time will not be considered.

RATING CRITERIA

22. A schedule of the proposal review calendar may be obtained from the OCWIB staff at the bidder's conference.

23. Proposers should not contact Board members or elected officials charged with oversight of these programs during the review process to avoid conflicts or the appearance of conflicts or undue influence over the process.

24. Proposals should be submitted to:

Orange County Workforce Investment Board

1300 South Grand, Building B
Santa Ana, CA 92705

Attention: Mark Mathews, Workforce Analyst

25. OCWIB staff retains the right to accept, reject, or negotiate proposals received as well as to vary or waive any provisions set forth in this request for proposals in the best interests of the OCWIB and the Orange County Board of Supervisors.

PROTESTS

26. All proposals will be subject to negotiation of terms, conditions, and amount.
- a. Protests related to proposal process or proposal specifications will not be accepted after the due date for acceptance of the proposals.
 - b. Protests must be made in accordance with Section 1.3 of the County of Orange Contract Policy Manual.
 - c. Grievances filed for contracts related to this proposal must be filed in writing within 5 days of the public Orange County Board of Supervisors meeting at which proposals are selected for award and must comply in all other respects to the information requested and service requirements as stated in the Orange County Contract Policy Manual.
 - d. Protests should be submitted to:

Orange County Workforce Investment Board

1300 South Grand, Building B
Santa Ana, CA 92705

Attention: Labor Market Research Projects RFP Team.

**LABOR MARKET PROJECTS
REQUEST FOR PROPOSALS**

EXHIBIT D

SUMMARY OF MAJOR OCWIB FUNDED RESEARCH PROJECTS 2002-2003

2002 Survey of Employers Report-ORA-July 2002

The Orange County Business Council (OCBC) in partnership with Godbe Research and Analysis (GRA) identified 10 industry clusters that serve as the engines of growth for Orange County and its Workforce. Two reports were prepared, 1) a summary and 2) a detailed report with an analysis of the survey industry and occupational needs findings. The ten defined industry growth clusters detailed were as follows:

Biomedical	Communications
Computer Hardware & Electronics	Computer Software & Services
Construction	Defense & Aerospace
Energy & Environment	Health Services
Business & Professional Services	Tourism

2002 Early Warning System-OCBC-July 2002

The Orange County Labor Force Early Warning System (EWS) was developed by the Orange County Business Council (OCBC) for use by the Orange County Workforce Investment Board (OCWIB). The focus of the report is to project changes in cluster employment within industry sector in response to various possible growth trends in the Orange County economy. The EWS models possess three broad capabilities that are easy to use. First, they facilitate analysis of County industry cluster employment effects from hypothetical changes in statewide total employment. Second, the models can be used to assess the interdependencies of County industry clusters and their contribution to total County employment. The third capability allows one to examine how employment changes in the 10 industry clusters affect demand for related occupations.

Orange County Workforce: State of the County 2003-OCBC, October 2003

The second annual State of the County Workforce publication is a partnership between the Orange County Business Council (OCBC), Orange County Workforce Investment Board (OCWIB), and Verizon Communications. The report builds upon earlier OCBC and partners workforce research and includes Orange County growth industry cluster research findings and updates.

The report is designed to help the workforce education and training professional community in Orange County gain a much more detailed understanding of the current and

future workforce needs of Orange County businesses. With a changing economic outlook facing the County, teachers need curriculum to be developed that is more relevant to better prepare students for opportunities in the Orange County economy. The reports states that educators and workforce professionals will benefit from the strategic information on how economic conditions will influence employment growth trends and labor force needs in specific industries.

2003 County of Orange CCOIS Occupational Outlook Report-April 2004

The Occupational Outlook Report is a product of the California Cooperative Occupational Information System (CCOIS), which is administered by the California Employment Development Department/Labor Market Information Division (EDD/LMID). The County of Orange Housing & Community Services Agency/Special Programs Division OC (HCSA/SPD) has processed annually this survey of thirty Orange County occupations and the report since 1990. The CCOIS program had 34 Local Partners covering the entire State of California and provides a consistent comparative profile of occupations needs and opportunities statewide.

Appendix 'A'

Professional and Business Services, Biomedical and Computer Software Clusters –

Survey of Employment Growth Clusters Occupations, Spring 2002

OCC	<u>Professional & Business Services</u>	<u>Descriptions for each Occupation</u>
1	Financial Managers	Financial Managers - Organize and direct the financial activities of an organization. Includes managers who negotiate policy with financial institutions, such as banks.
2	Accountants and Auditors	Accountants and Auditors - Analyze and interpret accounting records. Advise on systems of recording costs or other financial and budgetary data.
3	Account Collectors	Account Collectors - Locate and notify customers of delinquent accounts to solicit payment. Also receive payments, update accounts, and prepare account statements.
4	Accounting Clerks	Accounting Clerks - Compute, classify and record numerical data to keep financial records complete. Perform routine calculating, posting and verifying tasks for use in maintaining accounting records.
5	Administrative Services Managers	Administrative Services Managers - Plan, organize and direct the supportive services department of a business. Includes property managers and contract administrators.
6	Employment Interviewers	Employment Interviewers - Search application files, interview job applicants and refer them to prospective employers.
7	Drafters / CAD	Drafters / CAD (Computer Assisted Drawing) - Prepare working plans and detail drawings for engineering or manufacturing purposes.
8	Systems Analysts	Systems Analysts - Analyze business, scientific and technical problems for electronic data processing systems. Develop computer programs.
9	Sales Agents	Sales Agents - Sell selected business/professional services.
10	Telemarketers and Solicitors	Telemarketers and Solicitors - Solicit orders for goods and services over the phone. Sell goods or services door-to-door or on the street.
11	Paralegal Personnel	Paralegal Personnel - Assist lawyers by researching law, investigating facts and preparing legal documents.
12	Legal Secretaries	Legal Secretaries - Prepare legal papers and correspondence.
 <u>Computer Software</u>		
1	Software Engineers	Software Engineers - Can include programmers, quality assurance engineers, and web developers. Software industry workers that add value from a technical standpoint.
2	Systems Administrators / DB Admin	Systems Administrators - Includes database administrators and network administrators. Plan layout and installation of new systems or modifications of existing systems; may set up and control computer systems to solve scientific and engineering prob
3	Customer Support Specialists	Customer Support Specialists - Provide technical assistance and training to computer system users. Investigate and resolve computer software and hardware problems of users. Answer clients' inquiries in person and via telephone.
4	Project Managers	Project Managers - Plan, organize, and direct activities in such fields as electronic data processing, engineering, life sciences, physical sciences, statistics, systems analysis, and architecture. These employees spend the greatest portion of their time managing projects
5	Technical Writers	Technical Writers - Create content on websites, or write user documentation, or write or edit technical materials. May oversee preparation of illustrations and charts and assist in layout work.
6	Sales Representatives	Sales Representatives - Sell goods or services requiring scientific or similar knowledge in such areas as engineering, electronics, chemistry, and biology.

- 7 Inspectors, Testers, and Quality Assurance Auditors Inspectors, Testers, and Quality Assurance Auditors - Perform precision inspecting, testing, and grading of parts, and equipment for defects, and deviations from specifications. The majority of these workers use precision measuring instruments.
- 8 Network Systems Administrators Network Systems Administrators - Analyze data processing requirements to plan EDP system to provide system capabilities required for projected workloads.
- 9 Data Entry Keyers Data Entry Keyers type data into a computer. Data Entry Keyers are also called Data Entry Operators, Input Operators, and Key Data Operators.

Biomedical

- 1 Assemblers / Fabricators Assemblers / Fabricators - Assemble or fit together parts to form complete units or subassemblies. Work may involve the use of hand tools, power tools, and special equipment.
- 2 Optical Goods Workers Optical Goods Workers - Cut, grind, and polish eyeglasses, contact lenses, or other precision optical elements according to prescription or other specifications.
- 3 Sales Representatives Sales Representatives - Sell goods or services requiring scientific or similar knowledge in such areas as biology, engineering, chemistry, and electronics. Sell products such as medical supplies, electronic equipment, chemicals, and precision instruments.
- 4 Chemists Chemists - Conduct qualitative and quantitative chemical analyses or chemical experiments in laboratories for quality or process control or to develop new products or knowledge.
- 5 Chemical Technicians Chemical Technicians - Conduct chemical and physical laboratory tests to assist scientists in making qualitative and quantitative analyses. For work involving experimental, theoretical, or practical application of chemistry and related sciences.
- 6 Product Inspectors, Testers, Graders Product Inspectors, Testers, Graders - Inspect, test, grade, sort, sample, or weigh nonagricultural raw materials or processed, machined, fabricated, or assembled parts or products. Work may be performed before, during, or after processing.
- 7 Biological Scientists Biological Scientists - Research problems dealing with life processes. Include Biologists, Biochemists, Biophysicists, Pathologists, Bacteriologists, Toxicologists, and Zoologists.
- 8 Physical Scientists Physical Scientists - Conduct research into the phases of physical phenomena; develop theories and laws on the basis of observation and experiments; and devise methods to apply laws and theories to industry and other fields.
- 9 Medical, Clinical Lab Technologists Medical, Clinical Lab Technologists - Perform complex procedures in the area of the clinical laboratory or perform specialized procedures in such areas as cytology, histology, and microbiology.
- 10 Quality Assurance Auditors Quality Assurance Auditors perform audits of the production and quality control departments to determine if these organizational units are adhering to regulatory requirements and are complying with company specifications and standards.

**LABOR MARKET PROJECTS
REQUEST FOR PROPOSALS**

Attachment A

**COST REIMBURSEMENT
BUDGET SUMMARY**

COST CATEGORIES

PROGRAM

- 1. **Salaries and Benefits** _____
- 2. **Operations** _____
- 3. **Equipment: \$5,000 or Over** _____
- 4. **Equipment: Non Computer-\$1,000-\$4,999** _____
- 5. **Consultant/Subcontract** _____
- 6. **Travel/Mileage** _____
- 7. **Other** _____

PROGRAM SUBTOTAL _____

ADMINISTRATION

- 1. **Salaries and Benefits** _____
- 2. **Operations** _____
- 3. **Indirect** _____
- 4. **Indirect** _____
- 5. **Travel/Mileage** _____
- 6. **Other** _____

**LABOR MARKET PROJECTS
REQUEST FOR PROPOSALS**

Attachment B

Bidder's Conference Location/Directions

**Orange County Coastal Regional
One-Stop Center**

1675 Scenic Ave.

Costa Mesa, CA. 92626

Phone: 714-241-4900

From Riverside take CA-91, Riverside Fwy West to the CA-55 Costa Mesa Fwy South to the I-405 Fwy North towards Long Beach, bear right when nearing the Harbor Blvd. exit, get off at the Harbor Blvd. exit turn right onto Harbor Blvd. turn left onto Scenic Ave.

From San Diego take the I-5, San Diego Fwy North to the I-405, Fwy North towards Long Beach, bear right when nearing the Harbor Blvd. exit, get off at the Harbor Blvd. exit turn right onto Harbor Blvd. turn left onto Scenic Ave.

From Los Angeles take the I-110, Harbor Fwy South to I-405, Fwy South get off at the Brookhurst St. exit in Fountain Valley, turn right onto Brookhurst St. turn left onto Talbert Ave., Talbert Ave. turns into MacArthur Blvd, take MacArthur Blvd East to Harbor Blvd., turn right onto Harbor Blvd. turn left onto Scenic Ave.
