

III

Consent Items

- (a) Accept CQI Dashboard Reports for March and April 2010.
- (b) Accept Grant Report for May 2010.
- (c) Accept Executive Committee's April 29, 2010 recommendation to approve consultant for BusinessOwnerSpace.com website enhancements.
- (d) Accept Executive Committee's June 3, 2010 recommendation to approve consultant for Small Business Study.
- (e) Accept American Recovery and Reinvestment Act (ARRA)/Integration Update.
- (f) Accept NUMMI Update.

[Action]

Customer Satisfaction Performance Dashboard

Monthly Summary – March 2010

Report Date: April 9, 2010

Introduction: This report provides a summary of **key performance indicators** (KPI's) from the weekly Comment Card and the customer satisfaction measures from the Integration Performance Measures. The comment card report's key indicators provide lead indicators that help to understand the future performance of key processes. There are five key indicators out of the eight questions on the comment card. Two of these are also part of the integration performance measures. There are nine integration performance measures, four of which relate to customer satisfaction and two of the four overlap with the comment card key indicators.

Lag, Current and Lead: This report is made up of lag and lead key performance indicators (KPI's). Financial results, such as last quarter's revenue, are typically lagged by 2+ months. Annual results, especially fiscal year results, can be much more delayed. With such lags the problem arises as to what action might be appropriate to alter the direction of the organization's performance when the KPIs are measuring results in the past.

A correction may be inappropriate when the current performance has already significantly altered from that measured some time ago and may result in overcorrection. Lag indicators should rarely be considered as a KPI as the benefit of KPI is to adjust processes and behavior to get better performance.

KPIs of the leading type are predictive of desired results at the next higher level. An example of such a leading indicator for market share is customer satisfaction with the organization's products and service. The primary difficulty with leading KPIs is to be sure that they are strongly correlated with the required corporate goals; modeling and understanding of key business drivers is necessary.

Summary Period: March 2010

Report Dates: March 1-7, March 8-14, March 15 - 21 and March 22 - 28, 2010

Total Number of Responses: 274

Volume as of April 9, 2010:

- Number of new customers completing initial assessment and coaching:
 - 729 for the month of March
 - 6,406 year to date
 - Projected goal – 10,000
- Number of services core, intensive, training, misc. provided to customers:
 - 9,254 for the month of March
 - 60,214 year to date
 - Projected goal – 70,000

Customer Satisfaction Performance Dashboard Monthly Summary – March 2010

Conclusions and Analysis:

- Staffing remains a critical issue
- Coaches are doing an excellent job explaining services; however, customers want more information on next steps

Summary of Trends in Comments (shows up more than once across weeks):

- More computers for job search
- Talent Marketing area (San Jose) open later for use of computers
- Staff was identified as being helpful, professional, polite, knowledgeable, and respectful.
- Have dedicated coaches to enroll customer in workshops and provide bus passes
- Ability to make appointments online

Key Indicator Highlights¹:

Q1 – I was greeted promptly upon arrival.

Q2 – I waited less than 10 minutes for services.

Q3 – The staff treated me with respect.

Q4 – The staff was helpful to me.

Q5 – The information provide was useful in job search.

Q6 – The services or resources I used today were of quality

Q7 – I would recommend center to friend/colleague

Q8 – Overall satisfaction

Trends over the Period (across the month):

- **Q2** ranged from a low of 57% to 75% either strongly agreeing or agreeing that they waited less than 10 minutes for services.
- **Q5** had a range of 71% (combined strongly agree and agree) to 85% agreeing that the information was useful in job search.
- **Q6** had a range of 69% agreeing and strongly agreeing that services were of quality to 85% agreeing that services were of quality.
- **Q7** had a range of 69% to 90% agreeing they would recommend the center to a friend.
- **Q8** had a range of 63% in one week to 84% in another either strongly agreeing or agreeing that overall they were satisfied.

¹ Bold highlights the key lead indicators from the comment card questions and red highlights the common lead measures from both the comment card and the Integration Performance Measures.

**Customer Satisfaction Performance Dashboard
Monthly Summary – March 2010**

Indicators - MEASUREMENTS FOR THE INTEGRATION PILOT

	Measure	Indicators for Measure	Standard	Actual Standard as of November 29, 2009
5	The right candidate is referred to the right job	Employers report that they found the right candidate through referrals from the center	Employers report that there is a match 85% of the time by rating 'agree' or 'strongly agree' on comment card Q5	Business Services Team has revised questions and will now be able to gather data on-line and on paper. Data will then be input into the Business Services Survey System.
6	Number of customers reporting that the service received was accurate based on the identified needs	Customers rate the ability of the team to match them to the right service (i.e., the service produced the results that they expected)	Customers rate accuracy consistently at 'agree' or 'strongly agree' 85% of the time.	The CQI team will be revising the evaluations for the workshops and other surveys to capture the appropriate data.
7	Number of Individuals customers reporting that the service received was of quality	Customers rate the service(s) received as being of quality	Customers rate quality consistently at 'agree' or 'strongly agree' during the course of the pilot 100% of the time. (Comment Card Q 6)	Based on Question number 6 on the comment card: The services or resources I used today were of quality. From March 1 thru March 28, 2010 there have been 274 responses. Over the 4 weeks that make up the March report, the average for strongly agree and agree: Strongly agree: 46% Agree: 32% We have not yet met the standard of agreement 100% of the time.

**Customer Satisfaction Performance Dashboard
Monthly Summary – March 2010**

8	Time waited for staff assistance that meets client expectations	Customers report wait time	Customers consistently report that their wait time was less than 10 minutes during the course of the pilot 100% of the time. (Comment Card Q2)	<p>Based on Question number 2 on the comment card: I waited less than 10 minutes for services.</p> <p>From March 1, 2010 thru March 28, 2010 there have been 274 responses.</p> <p>Over the 4 weeks that make up the February report, the average for strongly agree and agree:</p> <p>Strongly agree: 38% Agree: 26%</p> <p>We have not yet met the standard of agreement 100% of the time.</p>
---	---	----------------------------	--	---

**Customer Satisfaction Performance Dashboard
Monthly Summary – March 2010**

Local Measures submitted to State as part of Pilot Plan																									
<p>Increase in the number of enrolled clients that participated in a “skill building activity”</p> <p>“Skill building activity” is defined as:</p> <ul style="list-style-type: none"> • Workshops • Assessments • Online training • Occupational Training (ETPL) • Career Cafe 	<p>1st year established baseline for the period July 1, 2008 to June 30, 2009. The baseline for the number of skill building activities completed by customers are as follows:</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th></th> <th style="text-align: center;">‘08/’09</th> <th style="text-align: center;">Projected ‘09/’10</th> <th style="text-align: center;">Year to Date</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Workshop Participation</td> <td style="text-align: center;">38,002</td> <td style="text-align: center;">45,602</td> <td style="text-align: center;">26,604</td> </tr> <tr> <td style="text-align: center;">Comprehensive Assessments</td> <td style="text-align: center;">17,420</td> <td style="text-align: center;">20,904</td> <td style="text-align: center;">6,717</td> </tr> <tr> <td style="text-align: center;">ETPL Training</td> <td style="text-align: center;">164</td> <td style="text-align: center;">197</td> <td style="text-align: center;">290</td> </tr> <tr> <td style="text-align: center;">Online Training</td> <td style="text-align: center;">250</td> <td style="text-align: center;">300</td> <td style="text-align: center;">397</td> </tr> <tr> <td style="text-align: center;">Total</td> <td style="text-align: center;">55,836</td> <td style="text-align: center;">67,003</td> <td style="text-align: center;">34,008</td> </tr> </tbody> </table> <p>2nd year work2future projects a 20% increase in activities and a 30% increase in the 3rd year.</p>		‘08/’09	Projected ‘09/’10	Year to Date	Workshop Participation	38,002	45,602	26,604	Comprehensive Assessments	17,420	20,904	6,717	ETPL Training	164	197	290	Online Training	250	300	397	Total	55,836	67,003	34,008
	‘08/’09	Projected ‘09/’10	Year to Date																						
Workshop Participation	38,002	45,602	26,604																						
Comprehensive Assessments	17,420	20,904	6,717																						
ETPL Training	164	197	290																						
Online Training	250	300	397																						
Total	55,836	67,003	34,008																						
<p>Satisfactory level of reported team work within each of the clients focused teams</p>	<p>1st year – staff used a “Pilot Feedback Form” to capture information for improved services, which established a baseline.</p> <ul style="list-style-type: none"> • An 80% satisfaction rate was achieved. <p>2nd year need for improved services will decrease by 20%, 3rd year need for improved services will decrease by 40%.</p>																								
<p><i>The integrated data collection system meets the needs of both WIA & EDD</i></p>																									
<p>Met performance standards during the pilot as compared to the period prior to the pilot.</p> <p><u>Performance Standards:</u></p> <ul style="list-style-type: none"> • # of customers accessing services after 30 days • # of skill building activities sessions per customer • # of soft exits • # of customers enrolled 	<p>For this program year the performance standards were:</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: center;">Program Year</th> <th style="text-align: center;">Projected</th> <th style="text-align: center;">Actual</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">‘08/’09</td> <td style="text-align: center;">4/6</td> <td style="text-align: center;">6/6</td> </tr> <tr> <td style="text-align: center;">‘09/’10</td> <td style="text-align: center;">3/6</td> <td></td> </tr> <tr> <td style="text-align: center;">‘10/’11</td> <td style="text-align: center;">5/6</td> <td></td> </tr> <tr> <td style="text-align: center;">‘11/’12</td> <td style="text-align: center;">6/6</td> <td></td> </tr> </tbody> </table> <p>Current measures not reflective of New Integration Model</p>	Program Year	Projected	Actual	‘08/’09	4/6	6/6	‘09/’10	3/6		‘10/’11	5/6		‘11/’12	6/6										
Program Year	Projected	Actual																							
‘08/’09	4/6	6/6																							
‘09/’10	3/6																								
‘10/’11	5/6																								
‘11/’12	6/6																								

Customer Satisfaction Performance Dashboard
Monthly Summary – April 2010

Report Date: May 7, 2010

Introduction: This report provides a summary of **key performance indicators** (KPI's) from the weekly Comment Card and the customer satisfaction measures from the Integration Performance Measures. The comment card report's key indicators provide lead indicators that help to understand the future performance of key processes. There are five key indicators out of the eight questions on the comment card. Two of these are also part of the integration performance measures. There are nine integration performance measures, four of which relate to customer satisfaction and two of the four overlap with the comment card key indicators.

Lag, Current and Lead: This report is made up of lag and lead key performance indicators (KPI's). Financial results, such as last quarter's revenue, are typically lagged by 2+ months. Annual results, especially fiscal year results, can be much more delayed. With such lags the problem arises as to what action might be appropriate to alter the direction of the organization's performance when the KPIs are measuring results in the past.

A correction may be inappropriate when the current performance has already significantly altered from that measured some time ago and may result in overcorrection. Lag indicators should rarely be considered as a KPI as the benefit of KPI is to adjust processes and behavior to get better performance.

KPIs of the leading type are predictive of desired results at the next higher level. An example of such a leading indicator for market share is customer satisfaction with the organization's products and service. The primary difficulty with leading KPIs is to be sure that they are strongly correlated with the required corporate goals; modeling and understanding of key business drivers is necessary.

Summary Period: April 2010

Report Dates: March 29 – April 4, April 5 - 11, April 12 – 18, April 19 – 25, and April 26 – May 2, 2010

Total Number of Responses: 192

Volume as of May 7, 2010:

- Number of new customers completing initial assessment and coaching:
 - 854 for the month of April
 - 7,178 year to date
 - Projected goal – 10,000
- Number of services core, intensive, training, misc. provided to customers:
 - 9,887 for the month of April
 - 73,533 year to date
 - Projected goal – 70,000

Customer Satisfaction Performance Dashboard
Monthly Summary – April 2010

Conclusions and Analysis:

- Staffing remains a critical issue
- Many customers are now going to Campbell, as they do not have appointments for Coaches

Summary of Trends in Comments (shows up more than once across weeks):

- More computers for job search
- Staff was identified as being helpful, professional, polite, knowledgeable, and respectful.
- Have dedicated coaches to enroll customer in workshops and provide bus passes
- Customers complain about computer lab staff not keeping noise levels down, not monitoring time limits, and that staff is hard to understand
- Customers continually comment that workshop schedule not posted on time

Key Indicator Highlights¹:

Q1 – I was greeted promptly upon arrival.

Q2 – I waited less than 10 minutes for services.

Q3 – The staff treated me with respect.

Q4 – The staff was helpful to me.

Q5 – The information provide was useful in job search.

Q6 – The services or resources I used today were of quality

Q7 – I would recommend center to friend/colleague

Q8 – Overall satisfaction

Trends over the Period (across the month):

- Q2 ranged from a low of 55% to 85% either strongly agreeing or agreeing that they waited less than 10 minutes for services.
- Q5 had a range of 67% (combined strongly agree and agree) to 100% agreeing that the information was useful in job search.
- Q6 had a range of 66% agreeing and strongly agreeing that services were of quality to 100% agreeing that services were of quality.
- Q7 had a range of 68% to 100% agreeing they would recommend the center to a friend.
- Q8 had a range of 55% in one week to 96% in another either strongly agreeing or agreeing that overall they were satisfied.

¹ Bold highlights the key lead indicators from the comment card questions and red highlights the common lead measures from both the comment card and the Integration Performance Measures.

**Customer Satisfaction Performance Dashboard
Monthly Summary – April 2010**

Indicators - MEASUREMENTS FOR THE INTEGRATION PILOT

	Measure	Indicators for Measure	Standard	Actual Standard as of November 29, 2009
5	The right candidate is referred to the right job	Employers report that they found the right candidate through referrals from the center	Employers report that there is a match 85% of the time by rating 'agree' or 'strongly agree' on comment card Q5	Business Services Team has revised questions and will now be able to gather data on-line and on paper. Data will then be input into the Business Services Survey System.
6	Number of customers reporting that the service received was accurate based on the identified needs	Customers rate the ability of the team to match them to the right service (i.e., the service produced the results that they expected)	Customers rate accuracy consistently at 'agree' or 'strongly agree' 85% of the time.	The CQI team will be revising the evaluations for the workshops and other surveys to capture the appropriate data.
7	Number of Individuals customers reporting that the service received was of quality	Customers rate the service(s) received as being of quality	Customers rate quality consistently at 'agree' or 'strongly agree' during the course of the pilot 100% of the time. (Comment Card Q 6)	Based on Question number 6 on the comment card: The services or resources I used today were of quality. From March 29 thru May 2, 2010 there have been 192 responses. Over the 5 weeks that make up the April report, the average for strongly agree and agree: Strongly agree: 56% Agree: 23% We have not yet met the standard of agreement 100% of the time.

Customer Satisfaction Performance Dashboard
Monthly Summary – April 2010

8	Time waited for staff assistance that meets client expectations	Customers report wait time	Customers consistently report that their wait time was less than 10 minutes during the course of the pilot 100% of the time. (Comment Card Q2)	<p>Based on Question number 2 on the comment card: I waited less than 10 minutes for services.</p> <p>From March 29 thru May 2, 2010 there have been 192 responses.</p> <p>Over the 5 weeks that make up the April report, the average for strongly agree and agree:</p> <p>Strongly agree: 39% Agree: 30%</p> <p>We have not yet met the standard of agreement 100% of the time.</p>
---	---	----------------------------	--	--

**Customer Satisfaction Performance Dashboard
Monthly Summary – April 2010**

Local Measures submitted to State as part of Pilot Plan																									
<p>Increase in the number of enrolled clients that participated in a “skill building activity”</p> <p>“Skill building activity” is defined as:</p> <ul style="list-style-type: none"> • Workshops • Assessments • Online training • Occupational Training (ETPL) • Career Cafe 	<p>1st year established baseline for the period July 1, 2008 to June 30, 2009. The baseline for the number of skill building activities completed by customers are as follows:</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th></th> <th style="text-align: center;">‘08/’09</th> <th style="text-align: center;">Projected ‘09/’10</th> <th style="text-align: center;">Year to Date</th> </tr> </thead> <tbody> <tr> <td>Workshop Participation</td> <td style="text-align: center;">38,002</td> <td style="text-align: center;">45,602</td> <td style="text-align: center;">39,364</td> </tr> <tr> <td>Comprehensive Assessments</td> <td style="text-align: center;">17,420</td> <td style="text-align: center;">20,904</td> <td style="text-align: center;">10,133</td> </tr> <tr> <td>ETPL Training</td> <td style="text-align: center;">164</td> <td style="text-align: center;">197</td> <td style="text-align: center;">352</td> </tr> <tr> <td>Online Training</td> <td style="text-align: center;">250</td> <td style="text-align: center;">300</td> <td style="text-align: center;">535</td> </tr> <tr> <td>Total</td> <td style="text-align: center;">55,836</td> <td style="text-align: center;">67,003</td> <td style="text-align: center;">50,384</td> </tr> </tbody> </table> <p>2nd year work2future projects a 20% increase in activities and a 30% increase in the 3rd year.</p>		‘08/’09	Projected ‘09/’10	Year to Date	Workshop Participation	38,002	45,602	39,364	Comprehensive Assessments	17,420	20,904	10,133	ETPL Training	164	197	352	Online Training	250	300	535	Total	55,836	67,003	50,384
	‘08/’09	Projected ‘09/’10	Year to Date																						
Workshop Participation	38,002	45,602	39,364																						
Comprehensive Assessments	17,420	20,904	10,133																						
ETPL Training	164	197	352																						
Online Training	250	300	535																						
Total	55,836	67,003	50,384																						
<p>Satisfactory level of reported team work within each of the clients focused teams</p>	<p>1st year – staff used a “Pilot Feedback Form” to capture information for improved services, which established a baseline.</p> <ul style="list-style-type: none"> • An 80% satisfaction rate was achieved. <p>2nd year need for improved services will decrease by 20%, 3rd year need for improved services will decrease by 40%.</p>																								
<p><i>The integrated data collection system meets the needs of both WIA & EDD</i></p>																									
<p>Met performance standards during the pilot as compared to the period prior to the pilot.</p> <p><u>Performance Standards:</u></p> <ul style="list-style-type: none"> • # of customers accessing services after 30 days • # of skill building activities sessions per customer • # of soft exits • # of customers enrolled 	<p>For this program year the performance standards were:</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th>Program Year</th> <th>Projected</th> <th>Actual</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">‘08/’09</td> <td style="text-align: center;">4/6</td> <td style="text-align: center;">6/6</td> </tr> <tr> <td style="text-align: center;">‘09/’10</td> <td style="text-align: center;">3/6</td> <td></td> </tr> <tr> <td style="text-align: center;">‘10/’11</td> <td style="text-align: center;">5/6</td> <td></td> </tr> <tr> <td style="text-align: center;">‘11/’12</td> <td style="text-align: center;">6/6</td> <td></td> </tr> </tbody> </table> <p>Current measures not reflective of New Integration Model</p>	Program Year	Projected	Actual	‘08/’09	4/6	6/6	‘09/’10	3/6		‘10/’11	5/6		‘11/’12	6/6										
Program Year	Projected	Actual																							
‘08/’09	4/6	6/6																							
‘09/’10	3/6																								
‘10/’11	5/6																								
‘11/’12	6/6																								

GRANTS REPORT

Contact	Funding Source/Sponsor	Due Date		Award Date	Name	Funding Request	Status	Lead/Partners
		Submitted	TBD					
					PENDING			
	TANF Grant	4/26/2010	TBD		TANF	\$2.5 Mill	Pending	County of Santa Clara/w2f
2	NEG	4/26/2010	TBD		Public Worker Transition	\$3.5Mill	Pending	work2future
	NEG OJT	5/2/2010	TBD		OJT	\$5.4Mill	Pending	work2future
4	DOL	4/29/2010	TBD		Community Based Job Training Grant	\$400,000	Pending	West Valley College/W2f
SUBMITTED								
5	Federal Earmark/Senator Boxer	2010		2011	Green HC Training Program	\$400,000	Submitted	work2future
	Federal earmark/Cong. Honda	2009		TBD	BOS support Minority Business	\$200,000	Pending	work2future
6	NEG	2010		2010	Emergency Nurmi	\$5.2Mill	Pending	work2future
7	Scott/Chris	2010		Summer 2010	Energy Efficiency Training	\$4.5mill	Submitted	CSJ-SF-CET
AWARDED								
7	City General Fund	2009		2009	BOS Support	\$100,000	Funding received	work2future
8	Wells Fargo	2009		2009	BOS Network	\$10,000	Funding received	work2future
9	Federal Earmark/Cong. Honda	2009		2009	Homeless Jobs	\$320,000	Implementation, July 1,08	work2future
10	CDBG	2009		2009	Sm Bus. Incubator	\$400,000	Implementation, July 1,08	work2future
11	Wash Mutual Bk	2009		2009	Celebracion	\$5,000	Funding received	work2future
12	Wash Mutual Bk	2009		2009	BOS Enhance	\$25,000	Funding received	work2future
13	Federal Earmark/Cong. Honda	2009		2009	New Americans	\$191,593	Working w/SJ Library	work2future
14	CDBG	2009		2009	Clean & Green	\$600,000	Borgata Contract closing	work2future
15	Wells Fargo	2009		2009	BOS	\$5,000	Funding received	work2future
16	Federal Earmark/Cong. Honda	7/1/1905		2009	BOS support	\$245,000	Awarded	work2future
17	EDD	2009		2009	CA Green Job Corp	0	Awarded	work2future
18	California Workforce Board	11/19/2009		2/14/2010	Regional Clusters of Opportunity	\$100,000	Awarded	work2future/Workforce Inst
19	DOL	10/5/2009		2/22/2010	ARRA Health Care Sector SGA/DFA PY 09	\$100,000	Awarded	NOVA
20	Target Foundation				Celebracion	\$5,000	Funding received	SJS Foundation
NOT AWARDED-CURRENT								
21	EDD/CWIB	4/15/2010		Jun-10	Veterans		Submitted (LOS)	National Hispanic U/w2f
22								

work²future
opportunity • jobs • success

Memorandum

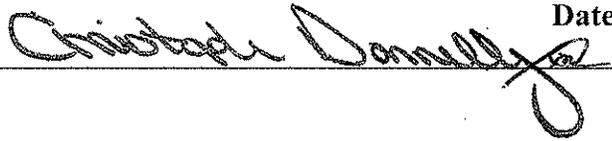
TO: work2future Board

FROM: B.J. Sims,
Business Services Manager

SUBJECT: BusinessOwnerSpace.com (BOS)
Website Consultant
Recommendation

DATE: June 17, 2010

Approved



Date

6-10-10

RECOMMENDATION

Board approval of the recommendation to contract with NIA Creative, Inc. (NIA) in an amount not to exceed \$158,150 as stated in NIA's Proposal to provide additional tools, information, and enhancements to the BOS website.

The Executive and Finance Committees approved the recommendation at their respective meetings of April 29, 2010 and June 9, 2010.

BACKGROUND

A RFP was released by work2future with a deadline of March 26, 2010 for a qualified consultant to provide website consulting, design, development, and implementation service in support of the BOS website. The RFP was posted on the City of San Jose's BidSync, an online procurement portal, through the Department of Finance and the BOS website. BOS Steering Committee and work2future Board members were made aware of the issuance of this solicitation.

The BOS website enhancement was funded through a Small Business Administration grant to work2future for \$245,643 to enhance the website and update outreach and marketing materials to small businesses. All proposals were evaluated upon the best value of the total project proposed. The chosen proposal is within the limits budget assigned by the RFP.

The current BOS website is composed of information gathered from a network of partner organizations and administered by the City of San Jose. The website serves small businesses in the greater Silicon Valley region. With enhancements, updates, and new tools added, the BOS website will be a more accessible, comprehensive, and useful one-stop resource for launching and growing a business in the greater Silicon Valley metropolitan area. The objective of this RFP is to update and improve the technical architecture of BusinessOwnerSpace.com.

RFP PROCESS

work2future received 20 proposals that were subsequently screened for compliance with basic format and completeness requirements as stated in the RFP. Based on this Phase I evaluation, three proposals were disqualified: two proposals due to late submission and one proposal was disqualified due to failure to submit ADA website accessibility requirements.

The remaining 17 proposals were then reviewed and scored in Phase II evaluation. The proposals were reviewed by an evaluation team that included the following individuals: a representative from the BOS Steering Committee, two work2future staff, and one staff member from the City of San Jose Office of Economic Development. A work2future Board Member served as a facilitator during the evaluation sessions. Evaluation team members scored the proposals according to the three substantive criteria outlined in the RFP:

- Proposer's technical capabilities and experience (45 points possible)
- Proposed budget and costs to complete the scope of work (30 points possible)
- Proposer's references and ability to show reliability and responsiveness (10 points possible)

In order to qualify for Phase III of the evaluation, proposals must first have met a pre-determined minimum score of 65 points out of the 85 points possible and then must be one of the top three scores. Fourteen proposals did not meet this threshold and therefore did not qualify for Phase III consideration. work2future staff also checked the proposers' references to seek feedback regarding customer satisfaction as it relates to the proposers' ability to provide quality services and timely product delivery. According to City procurement guidelines, proposers were awarded 5 additional points each if they met the guidelines in each of the following categories: Environmental Stewardship, Local and Small Business Preference.

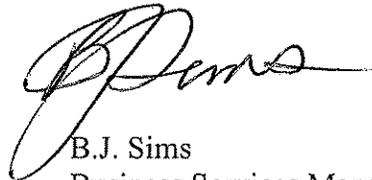
The three highest scoring proposers were invited to attend Phase III for oral interviews on April 12, 2010. During the interview, each proposer answered seven identical questions. Each interview question related directly to the same scoring criteria within Phase II: (1) Technical Capabilities and Experience (45 points possible), (2) Budget (30 points possible), and (3) Responsiveness and Reliability (10 points possible). Following each interview, the evaluation panel discussed each proposer's responses and scored them accordingly.

NIA's proposal received the greatest number of combined Phase II and Phase III points. Their proposal offered a comprehensive approach and workplan that exceeded expectations stated in the RFP's Scope of Work. NIA has strong, relevant experience with website architecture and compatibility, and database development. Additionally, NIA's proposal clearly identified methods to provide training, training materials, and technical support to work2future staff and BOS partner organizations during development and upon completion of the website enhancements.

NIA has a clear understanding of how to improve the delivery of business resources through the BOS website. NIA's workplan offered a comprehensive approach to integrate the existing website with new tools that will help business access information with more ease. Examples of these enhancements include an Online Survey Tool, a newsletter template, a new Online Resources Library, and a redesigned Discussion Form. The RFP scope of work requested the development of several new dynamic web pages, such as content about green resources, procurement opportunities, and information about access to capital. Finally NIA's proposal stated a timely workplan to address key improvement requested in the RFP, including website printability, ability to search for the website and website for information, and overall capacity to track, analyze and generate reports about website traffic and use. Moreover, NIA has a clear understanding of the objectives of work2future and other BOS partner organizations.

The budget range for this RFP was between \$100,000 and \$175,000. NIA's proposed budget to complete the RFP scope of work was \$97,700. The RFP allowed proposals to offer additional suggestions to improve the overall effectiveness of the BOS website for it's users. NIA has proposed the additional following additional enhancement such as a Virtual Job Fair, an online Resume Builder, a Searchable Resume Database, and a BOS Partner Video Library. These additional enhancements could total as much as \$60,450.

It is recommended that the Board authorize staff to contract with NIA for an amount not to exceed \$158,150 as stated in NIA's Proposal. The contract end date to complete the scope of work is December 31, 2010.



B.J. Sims
Business Services Manager
work2future

cc: Amy Chan
Jeff Ruster

work²future
opportunity • jobs • success

Memorandum

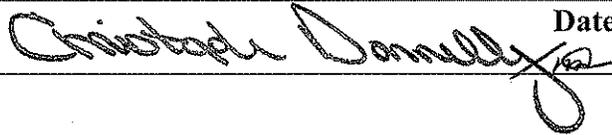
TO: work2future Board

FROM: B.J. Sims,
Business Services Manager

SUBJECT: Small Business Study Consultant
Recommendation

DATE: June 17, 2010

Approved



Date

6-10-10

RECOMMENDATION

Board approval of the recommendation to contract with BBC Research and Consulting (BBC), in an amount not to exceed \$75,000 from American Recovery and Reinvestment Act (ARRA) Rapid Response funds, to provide a small business study to include a trend analysis, BusinessOwnerSpace.com (BOS) Small Business Vibrancy Index, and an assessment to identify areas for encouraging small business start-up and growth.

The Executive and Finance Committees approved the recommendation at their respective meetings of June 3, 2010 and June 9, 2010.

BACKGROUND

In 2007, work2future served as a catalyst to establish the BOS network and website. As a part of work2future's continued effort to support small businesses and economic development opportunities locally, work2future released a Request for Proposal (RFP) to select a qualified consultant to research, analyze, and assess the small business community in the San Jose Metropolitan Statistical Area (MSA). The study is intended to identify characteristics, opportunities, and challenges facing work2future and partner organizations, so that we may appropriately assist small businesses.

RFP Process

The RFP was posted on the City of San Jose's BidSync, an online procurement portal, through the Department of Finance, and on the BOS website. The deadline for receipt of proposals was April 9, 2010. work2future received 15 proposals that were subsequently screened for compliance with basic format and completeness requirements as stated in the RFP. Based on this Phase I evaluation, eight proposals were disqualified due to failure to submit specific documents required in the RFP.

The remaining seven proposals were then reviewed and scored in Phase II evaluation. The proposals were reviewed by an evaluation team that included a representative from the BOS Steering Committee and San Jose City staff from work2future, the Redevelopment Agency, Finance, and Planning, Building and Code Enforcement (PBCE). Additionally, a work2future staff member served as a facilitator during the evaluation sessions. Evaluation team members scored the proposals according to the three substantive criteria outlined in the RFP:

- Proposer's technical capabilities and experience (50 points possible)
- Proposer's planned approach and workplan (40 points possible)
- Proposed budget and costs to complete the scope of work (10 points possible)

In order to qualify for Phase III of the evaluation, proposals must first have met a pre-determined minimum score of 65 points. Three proposers met that threshold and were invited to attend in-person interviews on April 23, 2010. During the Phase III interview, each proposer answered identical clarifying questions related directly to the same scoring criteria used for Phase II. The evaluation panel issued final scores based on Phase II as modified by Phase III interview results.

BBC's proposal received the highest overall score and offered a comprehensive approach and workplan that exceeded expectations stated in the RFP's Scope of Work. BBC has strong, relevant experience with data analysis, market research, and effective outreach methods. BBC's proposal clearly identified methods to develop an analytical framework to create a Small Business Index for surveys of local businesses. BBC has a clear understanding of how to improve the delivery of business resources through City departments and the BOS network. Since its founding in 1970, BBC has successfully undertaken more than 5,000 studies on a wide range of subjects. BBC has assisted a number of local and governments to design ways to improve the climate for small business start-up and growth, including the City of Austin, Texas and the Colorado Economic Development Strategic Plan.

SCOPE OF WORK

During the current economic downturn, work2future would like to better serve the small business community by understanding the role small businesses play, key indicators and overall vibrancy, and access to resources to grow and expand. The RFP, supported by federal Workforce Investment Act funding, centered upon the following deliverables:

1. **ANALYSIS** – Provide an analysis of the current profile (e.g., industry sector, age of firm, employee size) and trends within the San Jose MSA small business community. It would also include a spatial analysis to identify where small businesses are located. The trend analysis will seek to capture how small business has been impacted and what role they have played during various economic downturns and in the subsequent economic recoveries within the past twenty-five years (1985-2010). This component will include development of an analytical framework to assist in appropriately categorizing the different types of small business (sole proprietorships, family-owned, growth oriented,

etc.) in order to assist staff and other key stakeholders in thinking about and developing appropriate interventions to support the wide variety of small businesses in San Jose.

BBC plans to examine the economic structure of the San José MSA economy, with a focus on the relative importance of small businesses to overall employment, job creation, innovation and long-term business health. It will provide a profile of the small business community to include the number of businesses and employment by sector over time, an analysis of race/ethnicity/gender ownership, and a spatial analysis of business location within the MSA (to be integrated into GIS systems). Additionally, BBC will segment the small business community by key aspect, including type and stage in the growth cycle, and will describe long-term trends in the small business component of the local economy overall.

2. **BOS SMALL BUSINESS VIBRANCY INDEX** - Design and assist in initial implementation of an index that measures the overall vibrancy and impact of small business in the San Jose MSA. As currently envisioned, the BOS Small Business Vibrancy Index would consist of a composite of key indicators, including birth and death rates of small business, bankruptcies, defaults and foreclosures by small business, access to capital (debt, equity, and other), job creation and tax generation, and other relevant indicators that demonstrate and highlight the trends and current status of the impact of, and impediments faced by, small business within our local area. The index will need to be adaptable and available in a variety of formats (to be specified by staff). The index would be implemented annually by work2future staff to inform other City staff and relevant stakeholders of the opportunities and challenges confronting small business in our local community.

BBC will work closely with work2future and City staff to explore, design and produce an initial index of small business health for the San José MSA. Part of BBC's approach to development of the index will involve new telephone surveys with households and business owners, which will support index development and provide data for related tasks.

3. **ASSESSMENT** - Provide an assessment of the economic development impact of small business within our local area. Among other things, this should include such factors as job creation, tax/revenue generation, and innovation. Subject to information availability, it will also include an examination of how successful small businesses are in growing over time into medium or large businesses. In addition, the study will identify areas for encouraging small business start-up and growth. This may include better business planning support, enhancing access to capital, and other factors to stimulate small business formation.

BBC will coordinate with City staff, including members from the RFP evaluation team, to develop focus groups to assess where potential enhancements to permitting, licensing, and zoning, may be implemented. Additionally, recommendations from this study will be shared among City departments and committees in order to help identify areas to improve

delivery of services while resources and personnel may be severely reduced due to current budget impacts.

BBC will quantify the economic development impact of small businesses within the MSA. Initially, BBC will consult with the City and work2future staff to identify metrics with which to measure this impact, which would subsequently be used to assess the impact in order to identify opportunities to foster the start-up and growth of small business.

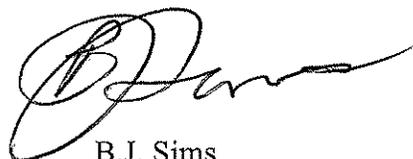
4. **RECOMMENDATIONS** - Provide appropriate recommendations to staff in order to make policy recommendations to address the challenges, impediments and opportunities regarding small business formation and growth within our local area. The recommendations will include conclusions from the analysis detailed above. Recommendations will also include suggestions to improve City programs and relevant service delivery models, and may additionally include suggestions to improve the permitting, zoning, and licensing processes.

This component will also include an examination of incentives and other support provided by communities outside the San Jose MSA and the State of California to support small business starts and growth, as well as proposed mechanisms to formulate systematic approaches to enhanced partnerships with the financial sector (e.g., Community Reinvestment Act lenders).

BBC will identify programs that serve small business in the San Jose MSA as well as in similar communities, and will conduct case studies of the support for small businesses in competing communities. BBC will also provide an analysis of partnerships with the financial sector, to be initiated by discussing general types of incentives and programs with City and work2future staff, and followed up through focus groups with local small business owners and business organizations, lenders, and service providers.

BBC will be responsible for developing and presenting its methodology, findings and policy recommendations as described for the deliverables above, and will present their report to various organizations and entities such as the San Jose City Council, work2future Board of Directors, relevant subcommittees, and the BOS steering committee.

It is recommended that the Board authorize staff to contract with BBC for an amount not to exceed \$75,000 as stated in the RFP and BBC's proposal. The scope of work is anticipated to be completed by August 30, 2010.



B.J. Sims
Business Services Manager



ARRA/Integration UPDATE: ADULT/DISLOCATED WORKERS 2009-2010
As of May 18, 2010

Training Goals	To Date
▪ ETPL Training – 387	359
▪ On The Job Training (OJT) – 16	5
▪ Cohort Training – 301	283
▪ Online Training – 600	600
▪ SJCC for credit	111
TOTAL	1,358

Key updates:

Workshops 12+ hours or more with certificates = 1,481

The NUMMI Transition Center opened for services March 29, 2010 to assist affected NUMMI workers, and,

The work2future City of San Jose Employee Transition Center opened on May 10, 2010 to provide services to impacted City of San Jose employees.

work2future Finance Committee
NUMMI Update
5/28/2010

Key Updates:

- On June 7, 2010, Department of Labor awarded the State of California \$19.2M for NUMMI employees for training and supportive services. The dollar amount for the award for work2future is undetermined at this time.
- On May 26, 2010, the State of California awarded 4 WIBs \$5.4M as bridge funding for the NUMMI program.
- Submitted NEG application requesting \$5.4 million for additional assistance to provide intensive case management, training, and other supportive services to NUMMI employees.
- The NUMMI Career Transition Center (NCTC), located at 1401 Parkmoor Avenue, San Jose, Suite 230, has been open to NUMMI employees and suppliers since March 29, 2010.
- As of May 28, 2010, there have been 242 enrollments and 766 visits by clients and potential clients to NCTC. 325 are enrolled in Alameda County from the San Jose service area. Expanded outreach has begun to both NUMMI employees and impacted suppliers. Additional information is available through the Nummi.info website.
- 1,825 are registered through WIBs in the six counties that are most impacted.
- Tesla Motors and Toyota announced an agreement to build electric vehicles at the NUMMI plant, possibly hiring as many as 1,000 workers over the next 12-18 months.

Key Issues:

- 818 employees are from Santa Clara County
- 655 are from work2future service area
- 592 are from San Jose
- 450 individuals from suppliers may be affected
- NUMMI has been TAA-certified: up to \$10,000 for training and other benefits

Suppliers to NUMMI:

- 30 Tier One Suppliers will be affected
- 35 Tier Two Suppliers will be affected
- 200 other suppliers will be directly or indirectly affected
- Meetings are continuing between EDD TAA managers and WIBs to develop TAA WIB co-enrollment process (no wrong door process)