



Special Meeting

Rogue Workforce Partnership - Corporate Directors

Wednesday August 30, 2017 • 3:00-4:00 p.m. | 100 E. Main Street, Suite A - Board Room • Medford

Video/Phone Conference access available <https://zoom.us/j/274430799>. Select your audio preference:

1) Use telephone +1 (669) 900-6833; Access Code: 274-430-799 (normal long distance charges will apply); 2) Or, use computer microphone & speakers (headset is recommended to avoid reverb)

Agenda

- | | | |
|-----------|--|---------------------------|
| 3:00 p.m. | Call to Order (1-2m) <ul style="list-style-type: none">▸ Welcome & Introductions | Jessica Gomez |
| 3:05 p.m. | One-Stop Operator Selection – <u>Action Item</u> <ul style="list-style-type: none">▸ 1 Proposal Submitted from OMEP (see attached) 📎▸ <u>Recommended Action</u>: Approve OMEP as One-Stop Operator & authorize staff to enter into One-Stop Operator contract with OMEP▸ Follow-up affirmation vote will be required from full RWP-Workforce Board at September 14th meeting. | Jim Fong,
Aurora King |
| 3:20 p.m. | RWP Meeting & College & Career for All 📎 <p>The CRLE Pyramid (see attached diagram) is a model for creating a regional business-education partnership framework for Career Related Learning Experiences for high school students. After doing much leg/prep work over the past many months, we think it's now timely to propose that cross-sector partners adopt this as a regional model. We want to add this as an agenda item, and invite more K-12 Superintendents and other partners to our September 14th RWP-Workforce Board meeting. We also want to cross-walk this discussion and decision-making process with all the K-12 Superintendents at their regular SOESD Superintendents meeting on September 18th. The prep work for this item just came to fruition last week, so we thought it would be timely to update you on this work and get your affirmation on these proposed next steps.</p> | Jim, Aurora |
| 3:40 p.m. | Executive Session <p>The Rogue Valley Workforce Partnership – Corporate Directors will hold an executive session to consult with counsel concerning legal rights and duties regarding current litigation or litigation likely to be filed. ORS 192.660 (2) (h).</p> <p>The following designated staff shall also be in attendance at the executive session: Jim Fong, Executive Director; Sherri Emitte, Chief Finance and Administrative Officer; Aurora King, Chief Operating Officer; and, Tami Allison, Senior Projects Manager.</p> <p>Representatives of the news media shall be allowed to attend, but are specifically directed not to report on any of the deliberations held during the executive session, except to state the general subject of the session as announced – pursuant to ORS 192.660 (4).</p> | Jessica,
Sherri Emitte |

3:45 p.m.	Other Items	Jessica
4:00 p.m.	Adjourn	Jessica

= Documents attached or will be handed out at meeting

Auxiliary aids and services are available upon request to individuals with disabilities.
Please contact Tami Allison at (541) 842-2518
tamia@rogueworkforce.org

Rogue Workforce Partnership One-Stop Operator Cover Letter

Organization: Oregon Manufacturing Extension Partnership, Inc.	Federal Tax ID Number: 93-1315027
Address: 7650 SW Beveland Street, Suite 170 Portland OR, 97223	Duns Number: 13-170-7338
Organization Contact: Michelle Fusak	
Phone: 503-406-3778	
Fax: 503-406-3779	
Email: mfusak@omep.org	
Fiscal Agent/Address: same	Contract Signer's Name: Aaron Fox
Fiscal Contact Name: Denise Masanga	Contract Signature Address: same
Phone: 503-406-3773	Phone: 503-406-3772
Fax: N/A	Fax: N/A
Email: dmasanga@omep.org	Email: afox@omep.org

DOCUMENTS:

- X Cover Letter
- X Proposer Information – Attachment #1
- X Narrative
- X Budget Attachment


SIGNATURE OF APPLICANT

8/17/2017
DATE

Michelle Fusak
TYPED NAME

ATTACHMENT # 1

PROPOSER INFORMATION

Proposer Name: OMEP

Primary Contact Person: Michelle Fusak Title: VP of Finance and Operations

Address: 7650 SW Beveland St, Suite 170 City, State, Zip: Portland, OR, 97222

Telephone: 503-406-3778 Fax: 503-406-3779 E-mail Address: mfusak@omep.org

Name and title of the person(s) authorized to represent the Proposer in any negotiations and sign any Personal Services Contract that may result:

Name: Aaron Fox Title: President

By signing this page and submitting a Proposal, the Authorized Representative certifies that the following statements are true:

1. No attempt has been made or will be made by the Proposer to induce any other person or organization to submit or not submit a Proposal.
2. Proposer does not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation or national origin, nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a minority, women or emerging small business enterprise certified under ORS 200.055.
3. Information and costs included in this Proposal shall remain valid for 90 days after the Proposal due date or until a Contract is approved, whichever comes first.
4. The statements contained in this Proposal are true and complete to the best of the Proposer's knowledge and Proposer accepts as a condition of the Contract, the obligation to comply with the applicable state and federal requirements, policies, standards, and regulations. The undersigned recognizes that this is a public document and open to public inspection.
5. The Proposer, by submitting a Proposal in response to this Request for Proposals, certifies that it understands that any statement or representation contained in, or attached to, its Proposal, and any statement, representation, or application the Proposer may submit under any contract DHS may award under this Request for Proposals, that constitutes a "claim" (as defined by the Oregon False Claims Act, ORS 180.750(1)), is subject to the Oregon False Claims Act, ORS 180.750 to 180.785, and to any liabilities or penalties associated with the making of a false claim under that Act.
6. The Proposer acknowledges receipt of all addenda issued under this RFP.

Signature:  Date: 8/17/17
(Authorized to Bind Proposer)

Rogue Workforce Partnership One-Stop Operator Proposal Narrative

Section A. Proposed Work / Demonstration of Effectiveness

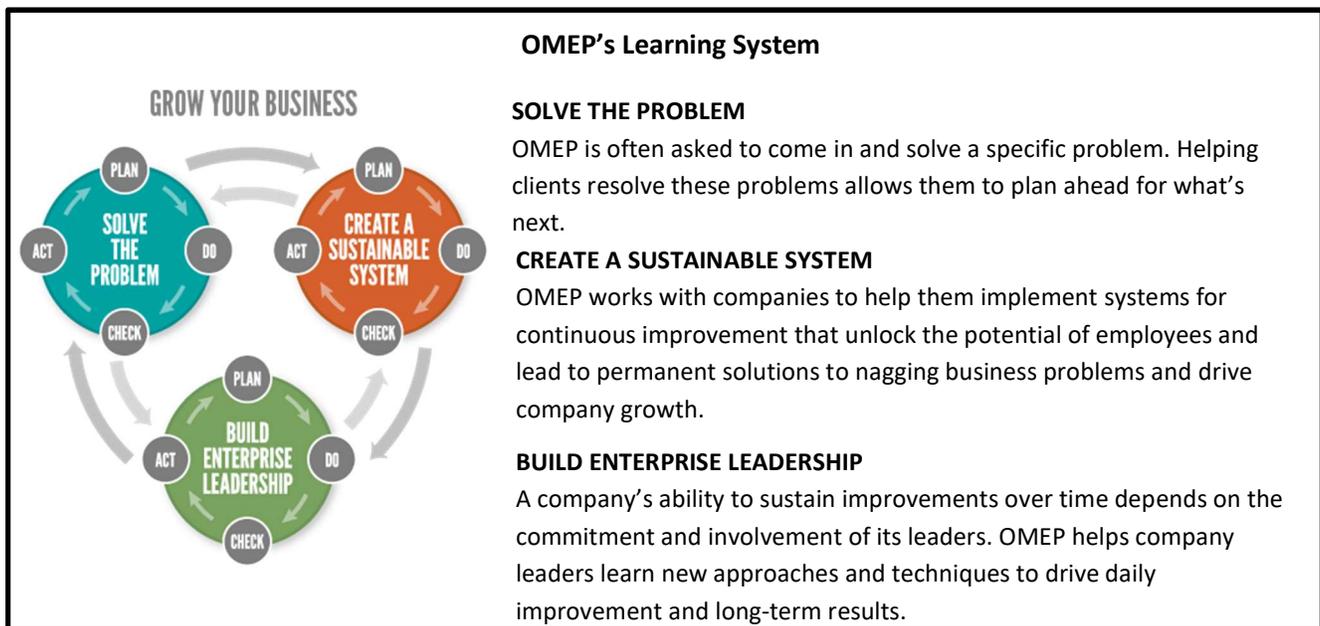
Describe the work your organization(s) would do in performing the coordination role of the One-Stop Operator.

- **How would you go about performing the duties, creating greater integration and alignment between workforce programs, and achieving results?**

OMEP relies on Lean Enterprise thinking and tools, particularly Value Stream Mapping, to help its clients develop a deeper understanding of the processes, policies, and procedures that might cause barriers to the flow of work and information. Value Stream Mapping is a powerful analysis and diagnostic tool that allows project participants to measure and see barriers to flow, areas of waste, and opportunities for the application of high performance tools. Originally developed for manufacturing, this approach is equally effective when applied to product/service and information flows.

In addition to Lean tools, OMEP has experience with customer service practices in both the public and private sectors. Wherever feasible, OMEP accomplishes its work through partnership and tight connections to workforce, economic development and industry groups interested to supporting the Oregon manufacturing sector.

Whatever the need, OMEP offers the tools, expertise, and the flexibility to engage with companies and agencies at all levels. OMEP always seeks to maximize the results for its clients and provide them with the guidance to meet or exceed the performance of their competitors or stakeholders' requirements.



Approach: OMEP will approach the One Stop Operator engagement as a continuous improvement assignment, focusing primarily on working with staff and leadership to

- Develop measurement systems that provide insight into performance on desired outcomes
- Diagnose problem areas and search for root cause
- Design approaches to accomplishing work that will help eliminate or minimize the waste and barriers to flow
- Measure the results of implementation experiments against the desired outcomes
- Build on successes and adjust activity based on experiment results

With respect to the need for certification and other compliance issues, OMEP will work with One Stop staff and leadership to develop a system of guided self-assessment and corrective action planning sufficient to satisfy regulatory requirements.

OMEP's client service routinely incorporates a significant element of organizational structure and systems analysis. Our approach to analysis begins at the system level as we attempt to understand the supplier-input-process-output-customer relationships within the system. Our ultimate goal is to work with the client to create a demand flow system where streamlined activities are linked together and subordinated to providing the customer its desired product, when it is needed, at the required quality level, and at a cost that allows for a sustaining enterprise. This activity invariably results in some organizational restructuring.

OMEP's key value is to "Solve problems thoughtfully". As Oregon's leading provider of operational excellence consulting, the application of continuous improvement (CI) principles forms the core of our service delivery. Since 2000, OMEP has worked with over 500 businesses, agencies, and governmental entities on continuous improvement projects of various shapes and sizes. While we are guided by lean enterprise principles, a core element of the OMEP Way is to "bend service around demand." OMEP works with the client to identify the barriers to its success and then seeks to apply the appropriate tools in a facilitated effort to help move the client to a higher level of performance.

While internal organizational improvements are a likely starting place for CI efforts, ultimate achievement of operational excellence always entails looking at partnerships with customers, suppliers, regulators, and other system participants to ensure that their combined efforts result in shared gain. Currently, we are engaged in several efforts to tie together the solo efforts of small food processing companies to comply with the Food Modernization and Safety Act (FSMA) in a cohort approach whereby each company can learn from their peer experiences as they move toward certification. This requires the ability to help each company understand the long term benefit of an effort that provides them the opportunity to be a teacher or alternatively, a learner.

- **Give examples of the kinds of improved results and improvements in the operation of the one-stop center and the workforce system that you anticipate could be achieved from your efforts.**

OMEP has, itself, been involved in multiple organizational efforts at accomplishing economic development and workforce development goals. Recently, OMEP staff was rewarded for its system work in implementing the Make It In Willamette Valley grant that was jointly funded by EDA, DOL, and DOC and involved the participation of SEDCOR, Incite, Mid-Willamette Valley Council of

Governments, and OMEP. OMEP sought to both provide services to client manufacturers and to contribute to the success of the collaboration by providing system CI thinking. Some specific examples of improved results and operational improvement include:

Business Oregon. OMEP has served as a continuous improvement and organizational development consultant for Business Oregon since 2010. In the course of this engagement, we have assisted various departments (primarily the Infrastructure Finance Authority) in projects focused both on the improvement of internal processes and the agency’s ability to improve service to customers. Assignments that have occurred in the last three years include:

- “Customer” feedback surveys (2014-15)--OMEP built a process-focused system of timely feedback (within 6 months or less of service delivery) that also measured conformance with statutory requirements. This allowed the department to respond more frequently and effectively to the voice of the customer. The primary activity of this project occurred in Salem, OR, but the project addressed IFA activities throughout the state with various cities, counties, and special districts.
- Leadership development (2014)—Members of the Infrastructure Finance Authority worked with OMEP to understand how to blend their approach to leadership with a continuous improvement culture. The specific training course is called Tools for Conscious Leadership. This activity occurred in Salem, OR
- Problem solving and visual management (2010-present)--Throughout the entire engagement, OMEP have continued to implement the deployment visual tools to lead problem solving analyses. This activity occurred in Salem, OR
- Reorganizational analysis and restructuring (2017-present)—OMEP has been engaged to perform a variety of efforts primarily resulting from the reorganization of Business Oregon in 2016. Currently we are assisting in the blending two formerly separate organizations with overlapping responsibilities. Business Oregon and IFA have been separate for nearly 10 years and with the recent reorganization were brought back together. OMEP is helping Business Oregon to look beyond job titles, roles and responsibilities and focus on the demand for work from a more holistic, customer serving perspective. The current focus is on accurately describing demand and performance measures and on building a comprehensive cross training matrix so that the management team can correctly gage capacity of the organization, training needs and overall effectiveness of programs. This is task requires coordinating people from historically different organizations, different functional groups and different geographic regions of the state. The activity is taking place in Salem and Portland, OR.
- Value Stream Mapping and Job Task Analysis for the Export Promotion (2017)--This is a small team, focused project using VSM and waste identification theories to optimize an existing process that was largely non-value added and create departmental Key Performance Indicators that provide more opportunities for measuring and adjusting the process in the future. The activity is taking place in Salem and Portland, OR.

Section B. Organizational Experience and Leadership Expertise

Describe the following:

1) The leadership experience and expertise of your local management team in:

(a) Coordinating service delivery of required WIOA one-stop partners / service providers in a One-Stop Center

OMEP was selected in a competitive process to be the One-Stop Operator for the Lane Workforce Partnership, East Cascade Workforce Investment Board, Clackamas Workforce Partnership, Incite, and the Northwest Oregon Works. OMEP has a staffing plan in place to meet the needs of each of these partners and service providers. For the Rogue Workforce Partnership, OMEP proposes the following staffing plan:

Staffing: OMEP will deploy a variety of staff experts on this project. While part of the initial assessment of work will incorporate a skills and compatibility review to finalize staff assignments, it is likely that the following individuals will be assigned to the One Stop Operator project team.

Paola Castaldo, OMEP Managing Consultant. Paola will serve as OMEP’s project executive. As such, she will be responsible for engagement planning and work design, staff assignments, project evaluation and overall client relations. Paola brings more than 25 years of engineering, management, and marketing experience to OMEP in a variety of manufacturing and business environments. She has successfully helped companies re-engineer processes and bring on cultural change utilizing effective lean methodologies. Her experience spans starting up and running her own business, to producing results in large corporations. She is guided by a passion for people to succeed and flourish in business.

Since joining OMEP, Paola has provided project leadership, analysis, and implementation assistance at companies including, Premier Press, FEI Company, Business Oregon, and A.R.E. Manufacturing. Paola served as the lead on the development of OMEP’s SMART Talent program and is the practice leader for that service area. SMART Talent is a program that helps companies design and implement structured on-the-job training methods and career ladders. Paola also led a project with Business Oregon’s Office for Business Inclusion and Diversity, which successfully reduced lead times for certification of MBE/WBE/ESB businesses.

John Lamy, OMEP Medford Manufacturing Consultant. John will serve as the process improvement specialist for this project. As such, John will be responsible for leading Value Stream Mapping analyses and action plan development and implementation. John is based in Southern Oregon and has served OMEP clients in a wide range of roles – including R&D, strategy, quality, and manufacturing. John Lamy has over thirty years of experience helping large and small companies grow their businesses. John worked at Hewlett-Packard/Agilent Technologies for many years, serving as an R&D Manager, Quality Manager, and Manufacturing Engineering Manager. As a consultant in OMEP’s Medford office, John also brings value locally as he is familiar with the challenges and opportunities in this region of the state.

(b) Coordinating service providers across a one-stop delivery system.

During to last 15 years, OMEP has often operated in partnership with workforce investment boards throughout the state. Interactions with the Workforce system include utilizing Employment Workforce Training Grants provided by WIBs to provide training services in lean manufacturing and other

management tools and techniques to companies; collaborative grant delivery such as those mentioned previously with WSI, CWP and Incite; and VSM analysis and lean implementation activities in WorkSource centers in Northwest Oregon and Southwest Washington through the WIRED grant.

OMEP has the ability to deploy its 13-person statewide consulting staff to assist WorkSource in continuous improvement efforts and help ensure compliance. Since 2003, through its work with Oregon manufacturers, OMEP has led continuous improvement activities that have resulted in:

- The creation and retention of 7,700 jobs
- An increase of \$864,000,000 in new or retained sales
- Cost Savings of greater than \$98,000,000

(c) Coordinating service delivery in a multi-center area, including comprehensive and affiliate sites.

OMEP's success is dependent on its partnerships with others, including state and local governments that provide grant funding, secondary institutions such as community colleges that work within OMEP's manufacturing client base to provide required skills training, and community-based organizations that provide grant funding and, in some cases, services to company employees. One such example of the latter is the Mid-Valley Literacy Center, which provides ESL training to one of our client's employees. We have also collaborated extensively with other community-based and government agencies, including entities in the workforce development system, with multiparty grant applications and delivery.

In addition, OMEP coordinates with a variety of governmental, educational, and community non-profit agencies in its annual Manufacturing Day activities. In the Portland region, that effort entails extensive coordination among Worksystems, Inc., Portland region high schools, area manufacturers, and several community-based programs such as Impact NW.

Other types of partnerships that we have facilitated as a third party include customer-supplier relationships where extensive cooperation between and among parties is necessary to ensure effective production.

2) If applicable, describe your organization's role as a provider of services within a WorkSource Oregon other similar One-Stop Center.

Similar to the WorkSource centers, OMEP's success is dependent on mutually supportive partnerships. OMEP has a strong history of partnership with the workforce delivery system in Portland metro and Mid-Willamette regions. This is evidenced by formal programmatic and financial relationships through joint or cooperative administration and delivery of several grants similar to those mentioned previously. We have also served as a service delivery partner in those and other grants, particularly in the delivery of lean training to Incite program participants and undertaking service delivery through DOL grants to Oregon manufacturers.

OMEP has participated in several consortium projects since its inception, three of which are described below:

Metro In-Sourcing Training Initiative (MISTI): Department of Labor awarded OMEP a \$5 million H-1B grant in 2013 to support a variety of classroom training activities designed to upgrade worker skills in certain high-demand occupations. OMEP developed the grant application in collaboration with Worksystems, Inc. and, throughout the grant period worked closely with WSI, grant sub-recipient, to deploy grant resources. This grant provided OMEP the ability to work closely with WSI in the administration of funds and the delivery of grant resources. Role: Grant recipient. Project collaborator.

Make it In Willamette Valley: OMEP worked with Incite, SEDCOR, and Willamette Council of Governments to develop and deploy a series of grants through the “Make it America” program funded by Departments of Commerce and Labor, and the Economic Development Administration. Through this grant, EDA funds were deployed to gather in-depth information on the Salem region’s manufacturing industry, DOL funds were deployed to provide training opportunities for incumbent workers to upgrade their skills in lean and process improvement and DOC funds were used by OMEP to help companies implement lean projects, undertake strategy and business model analysis, and perform supply chain improvement activities. This four-agency collaboration maintained a high degree of interaction and communication throughout the grant period and all grant outcomes were reached or exceeded. Role: DOC grantee. Project collaborator.

Innovations in Advanced Metals and Materials: This “JIAC2” grant was jointly funded by DOL, DOC, DOE, and EDA. The grant objectives were to better understand supply chain relationships and bring innovative services to metals and advanced materials companies in the greater Portland region. Recipients/sub-recipients included OMEP, Columbia Region Economic Development Corporation (CREDC), Impact Washington, Greater Portland, Inc., Worksystems, Inc., Clackamas Workforce Partnership, Southwest Washington Workforce Development Commission, and a number of other economic development and non-profit organizations. The effort was coordinated by CREDC and all grant goals were met. Role: Subrecipient. Project participant.

Other consortium projects include, The DOL-funded Renew Northwest (ReNW) grant which included OMEP, WSI, SWWDC, and CWP; a DOL-funded grant to provide lean training to food processing companies which included the MEP centers from Washington, Idaho, and Nevada; and a NIST MEP-funded project that included the Oregon, Washington and Idaho MEP centers and Northwest Food Processors Association to undertake technology acceleration projects with small food processing companies.

One-Stop Operator Budget Form - Rogue

Organization Name: Oregon Manufacturing Extension Partnership (OMEP)

PERSONNEL EXPENSES				
Job Title	Annual Gross Salary	Annual Taxes & Fringe Benefits	% of FTE Charged to Contract	Total Personnel Expense
Project Consultant	113,000	39,550	15.00%	\$ 22,882.50
Managing Consultant	128,000	44,800	3.00%	\$ 5,184.00
				\$ -
TOTAL PERSONNEL EXPENSES	\$ 241,000	\$ 84,350	18%	\$ 28,066.50
OPERATING EXPENSES				
Budget Line Item	Budget Amount	Line Item Cost Calculation		
Travel	\$ 2,592.00	Bi-Weekly trips to RWP, plus project manager oversight 3 visits		
Materials, Services & Supplies	\$ 1,534.85	\$5,000 per FTE (historical result), training supplies		
Other:				
TOTAL OPERATING EXPENSES	\$ 4,126.85			
OVERHEAD EXPENSES				
Budget Line Item	Rate(s)	Budget Amount	Line Item Cost Calculation	
Indirect Rate/Admin Costs	10.00%	\$ 2,806.65	Federally approved rate is 50.1%. OMEP agrees to reduce the rate to 10% of salary and fringe for this contract	
		\$ -		
TOTAL OVERHEAD EXPENSES		\$ 2,806.65		
PROPOSED BUDGET TOTAL	\$	35,000.00		

Budget Narrative:				
<p>Personnel: Includes funding for .15 consultant FTE to perform One-Stop Operator efficiency project. In addition, .03 Managing Consultant FTE for advisory support to project. Fringe is based on a rate of 35% which includes health insurance benefits and payroll taxes & fees.</p>				
<p>Operating Expenses: Travel for Consultant and Managing Consultant to meet with Rogue Workforce Partnership. Assumes two trips per month for project consultant at a distance of 25 miles each way. Managing Consultant will travel three times during project to provide senior advisory support. Also includes Supplies for training materials.</p>				
<p>Overhead: Budgeted at 10% of Personnel Expenses. OMEP's federally approved indirect rate is 50.1%, however, OMEP agrees to reduce to 10% for this project.</p>				

CRLE Pyramid

Career Related Learning Experiences / Experiential Learning Model

