

DATE: December 11, 2018

TO: RuthAnne K. Hall, Purchasing Manager

FROM: Jennifer Serino, Director Lake County Workforce Development

RE: Bid Exemption Request for Lake County Partners – Business Engagement Program

Lake County Workforce Development is requesting a bid exemption to enter into an agreement with Lake County Partners to deliver a Business Engagement Program. The reason for the sole source procurement is based on the long-standing, productive relationship between Lake County Workforce Development and Lake County Partners. The agreement would be grant-funded through WIOA adult and dislocated funds not to exceed \$80,723 for a twelve-month period beginning (DATE needed). The agreement would allow for three, one-year renewals. This agreement would expand upon the success of the business outreach program established between Workforce Development and Lake County Partners by focusing efforts on building new relationships and getting more information about the assets the ecosystem partners can bring to employers/businesses throughout Lake County.

SCOPE OF WORK:

Lake County Workforce Development administers the Workforce Innovation and Opportunity Act (WIOA) grant and programs. Employers and businesses are key customers of Workforce Development. They are not only stakeholders, but resources in understanding the needs of local businesses and developing talent through WIOA-funded programs. Furthermore, employers and businesses function as program users. They make internships available and create training and onboarding plans by which new hires gain the skills and talent needed to be successful on the job, retain employment, work on a career pathway, and train current employees to retain and advance and to avert layoffs.

Lake County Workforce Development (WDD) desires to utilize Lake County Partners to connect with a greater pool of industry and employers to better educate businesses on the services of WDD along with the other partners of the ecosystem and job center. They should provide a continuum of shared information on programs, incentives, and trainings that businesses throughout Lake County can access to train the talent they need, meet demands of industry, and better position themselves in a competitive global economy.

Lake County Partners has identified that they have successful media to connect with a greater number of employers/businesses throughout Lake County and Workforce Development is interested in partnering and sponsoring these media.

A key element to the success of the work completed between Lake County Partners and Workforce Development has been the utilization of a common customer relations management system, Salesforce. Workforce Development is interested in supporting the administration of Salesforce along with purchasing Salesforce licenses.

Lake County Partners (LCP) will invoice the Workforce Department monthly for staff and overhead and per successful delivery of activities.

Lake County Partners will provide:

- Lake County Partners will identify Lake County employers in in-demand industry sectors that have a workforce development need and/or are interested in learning more about what the partners of the ecosystem and job center have to offer.
- Lake County Partners will market and recruit businesses/employers to attend a forum; no less than 8 employers/businesses should attend each forum.
- Lake County Partners will target a forum for the major key industries in Lake County, a small business forum, a forum for employers with common workforce needs, and a forum for a specific municipality.
- Lake County Partners will be responsible for communicating and scheduling dates/times with Workforce Development.
- Lake County Partners will be responsible for maintaining Salesforce, administering Salesforce, providing monthly and quarterly reports from Salesforce data, providing a data analysis on the forum attendance.
- Lake County Partners will be responsible for working with the Workforce Board to establish opportunities for sponsored events in which the Workforce Board can communicate its role along with access to Workforce Development programs and services.

The Workforce Department will provide:

- Attendance at each forum
- Prepare materials and presentations for each forum
- Set up next steps and appointments with employers/businesses
- Provide for grant funded programs
- Update Salesforce with most relevant and current information

The Workforce Board will provide:

- Context for sponsored events
- Materials and presentations at sponsored events
- Oversight of the budget and agreement

Workforce Development agrees to reimbursement Lake County Partners monthly for Salesforce Administration – not to exceed 50% of a staff person responsible for Salesforce administration. The deliverable for this administration includes:

- Workforce Development agrees to reimbursement Lake County Partners for Salesforce licenses at the agreed-upon annual rate in the agreement between Lake County Partners and Salesforce. The deliverable for this includes Workforce Development staff have (What Level) access to Salesforce.
- Workforce Development agrees to reimburse Lake County Partners for forums at \$5,000 per forum, to be invoiced per event with the list of employers in attendance. The deliverable is not to exceed 6 forums in year one of the agreement. Target 8 employers/businesses at each forum. Forums held by industry, small business, geographic location, common workforce development issues. Forum calendar agreed to by Workforce Development team.

- Workforce Development agrees to reimburse Lake County Partners for a Workforce Development Board sponsorship of one quarterly news-letter and one quarterly economic development event annually. Not to exceed \$2,500 per sponsorship. The deliverable is a focus on workforce development trends and information as agreed to by the Workforce Board.

Budget

Salesforce Administration – 50% of staff time	\$34,600
Salesforce Licenses - \$1,750/ 4 staff	\$ 7,000
Employer Forums/Events - \$5,00 each	\$30,000
Workforce Board sponsor newsletter	\$ 2,500
Workforce Board sponsor EDAG meeting	\$ 2,500
General Overhead	\$ 4,123
Total Agreement	\$80,723