



# OMJ Center Operations

**Ron Weber**, ODJFS Office of Workforce Development

**Kip Crist**, ODJFS Office of Workforce Development

**Jay Easterling**, ODJFS Office of Contracts & Acquisitions

**Tom Hutter**, ODJFS Office of Workforce Development

**WIOA Implementing Change Training Event – October 2015**

# Overview of Presentation

- 
1. Considerations for Selecting Operator
  2. Procurement Requirements
  3. Requests for Proposals
  4. OMJ Center Certification
  5. Panel Presentation

# OMJ Center Operations

## Part 1. Considerations for Selecting the Operator





# WIOA Requirements



**WIOA 121 (d)  
(2) (a)**

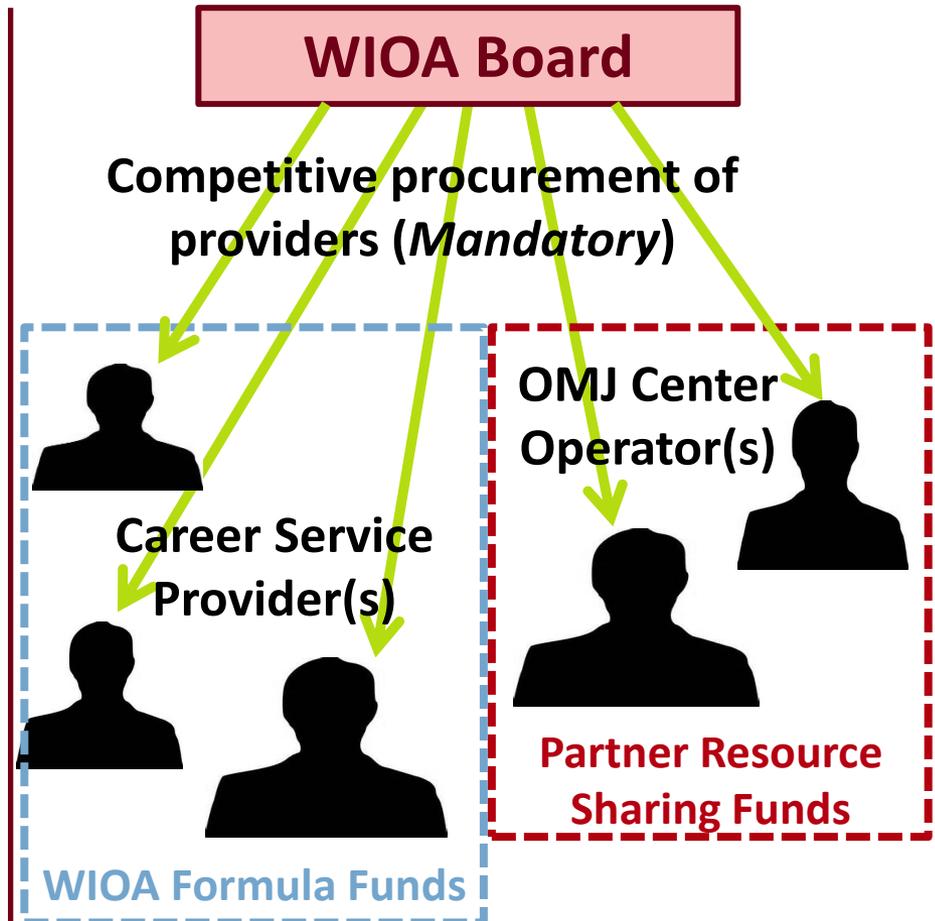
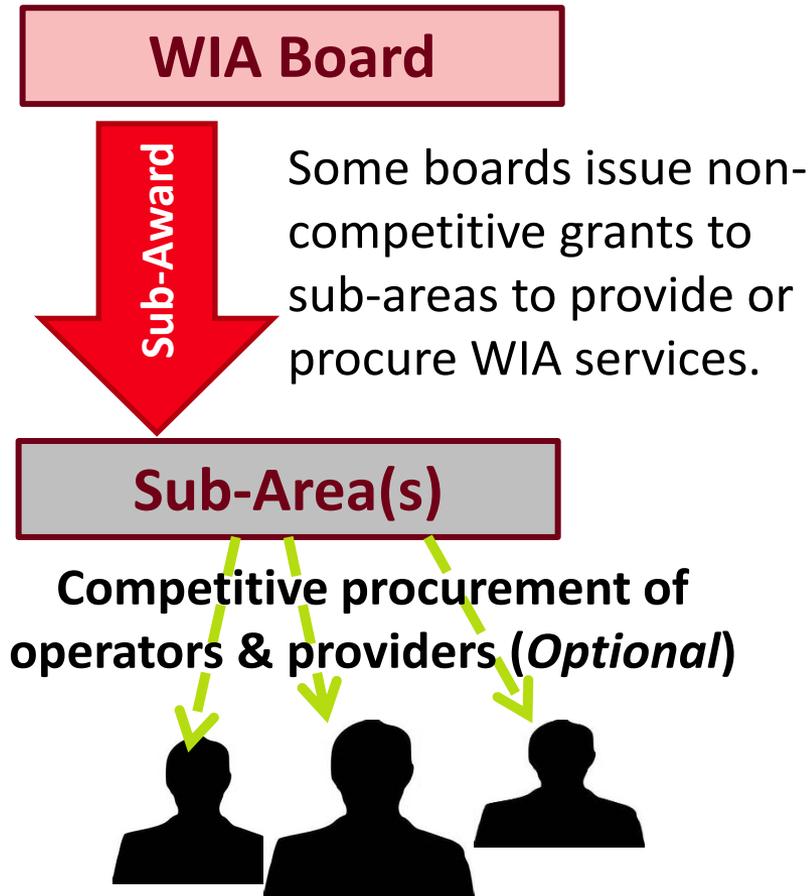
**Operator can  
be for-profit,  
non-profit, or  
govt. entity**

**Competitive  
Process**

**Operator  
procurement  
is local board  
function**

**At least one  
Center per  
area**

# WIA Model vs. WIOA Model





# Who Can Conduct OMJ Center Operator Procurement?

---

**Board**

Or board's staff

**Fiscal Agent**

If no conflict exists

**Board's  
consultant**

If no conflict exists

# Government vs. Non-Profit vs. For-Profit Operator?



## Government

- Experienced with following policies & regulations
- May hesitate to make controversial decisions or to move quickly



## Non-Profit

- Mission oriented
- Accustomed to survival with inconsistent funding
- May value customer outcomes over regulations or costs



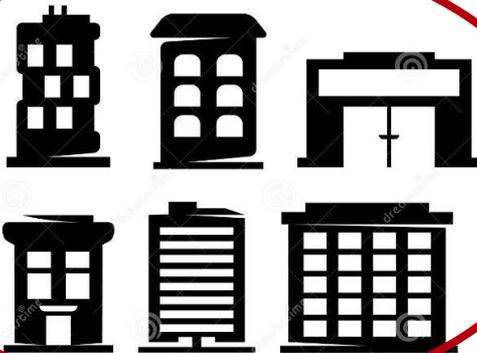
## For-Profit

- May be fast to act with low service delivery cost
- May be more focused on money than mission
- Area will need to negotiate a fair profit

# Ratio of Operators to Centers: One Operator over all Centers

Local Board

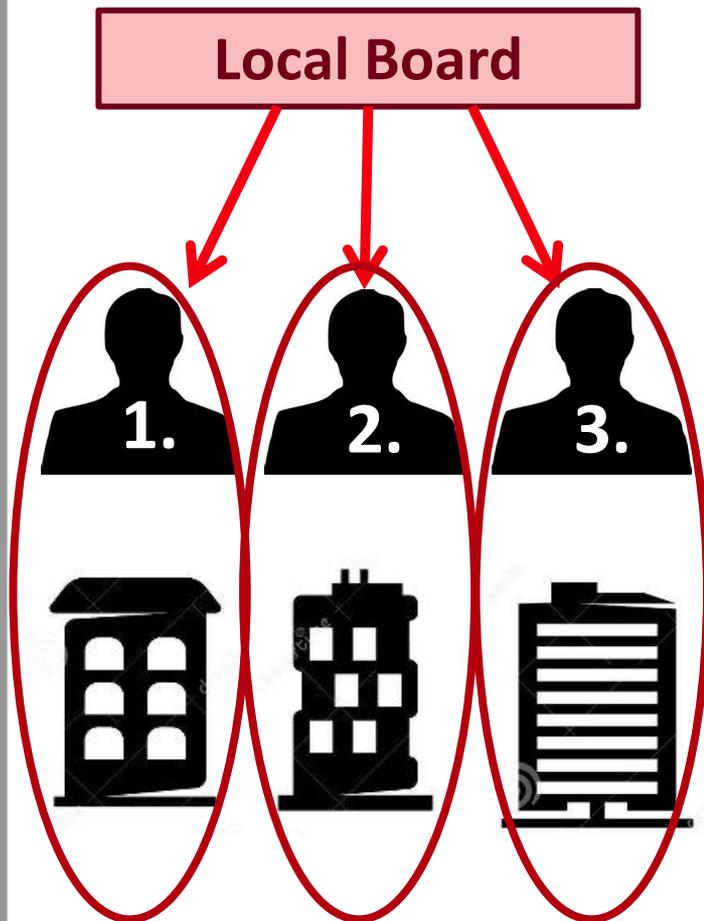
Operator



**Board selects one entity to operate all OMJ Centers**

- Greater control and consistency area-wide
- More economies of scale
- Fewer potential bidders willing or able to take on the task

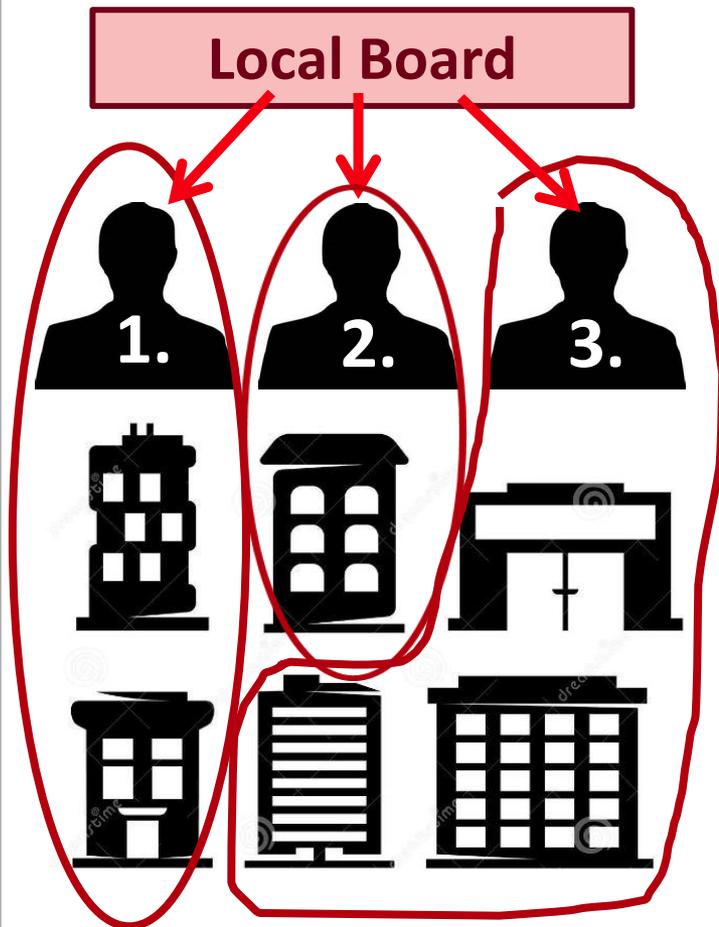
# Ratio of Operators to Centers: One to One



## Board selects unique entity to operate each Center

- More agreements and relationships to manage
- Greater local customization
- Greater variances in services and quality

# Ratio of Operators to Centers: Many to Many



**Board permits bidder to propose how many sites it will operate**

- Greatest flexibility for bidders
- Mixture of service consistency and local customization



# Considerations for How Many Operators to Procure



## One Operator

Few OMJ Centers

Similar environments

Consistency preferred

Limited board oversight & communication resources

Continuum



## Multiple Operators

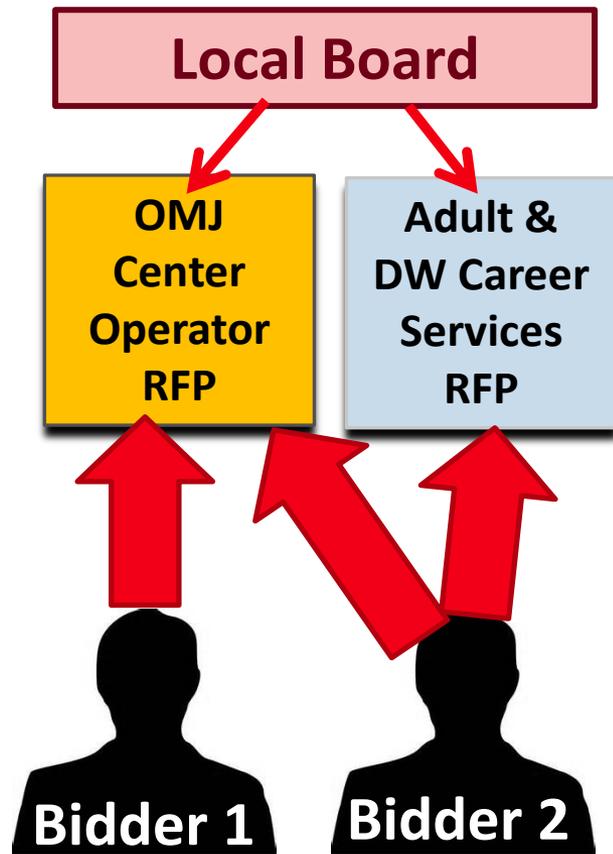
Numerous OMJ Centers

Diverse environments

Customization preferred

Plentiful board oversight & communication resources

# Issuing Separate RFPs for Operator and Career Services



## Board issues separate RFPs for Career Services and OMJ Center Operator

- More agreements and relationships to manage
- More inclusion of new providers in delivery system
- Cleaner separation of WIOA vs. One-Stop duties

# Combining OMJ Operator RFP with Career Services RFP



**Board issues one RFP.**

**Bidder must offer Operator duties + Career Services**

- Fewer entities willing or able to take on the task
- Fewer RFP processes and contracts to manage
- Less ability to use market forces to improve quality

# Timeframe Considerations: Procure Operator by 7/1/16



Date	Activity Completed
7/1/2016	Procured Operator begins work.
June 2016	Negotiate & write contract. Issue PO.
Late May 2016	Selection finalized by Board, appeals heard. <i>(When is your board's spring 2016 meeting?)</i>
By mid-May	Review committee rates proposals, identifies highest scoring proposal(s).
Mid-Feb to mid-April	60 days for bidders to submit proposals.
By mid-Feb. 2016 (ideally in January)	One-Stop Operator Request for Proposals is released. Bidder's conference is held.
December 2015	Write RFP requirements, define Operator roles, determine scoring criteria.

Time

# OMJ Center Operations

## Part 2. Procurement Requirements





# WIOA Requirements

---

**WIOA 121 (d)  
(2) (a)**

**Competitive  
Process**

**At least one  
Center per  
area**



# OhioMeansJobs (OMJ) Operator Procurement

---

Factors to consider prior to initiating procurement process:

- Local Workforce Development Board Responsibilities
- Local Workforce Development Board Vision
- Relationship between the Local Workforce Development Board and the OMJ Center Operator
- Procurement of the OMJ Center Operator



# OhioMeansJobs (OMJ) Operator Procurement

---

## Local Workforce Development Board Responsibilities:

- The Board is authorized, with the agreement of the Chief Elected Officials, to certify and/or terminate the eligibility of the Operator;
- The Operator MUST be certified through a competitive process;
- The Operator can be:
  - A public, private, or non-profit entity
  - A consortium of entities that must include at least three (3) or more required partners
  - Institution of higher education
  - State Wagner-Peyser employment agency





# OMJ Operator Procurement



## Local Workforce Development Board Responsibilities:

- The Operator can be (continued):
  - Community-based organization, non-profit organization, or intermediary
  - Private, for-profit entity
  - Government agency
  - Other interested organization or entity, which may include a local chamber of commerce, business or labor organization
- The Operator cannot be:
  - An Elementary or Secondary School, except non-traditional public secondary schools and area career and technical education schools
  - Staff of the workforce development board



# OMJ Operator Procurement

---

## **Local Workforce Development Board Responsibilities:**

WIOA 121(e) defines the requirements of a local system, which should be used to determine the responsibilities of the Operator.

The local system must:

- Provide career services;
- Provide access to training services, including serving as the point of access to training services for participants with individual Training Accounts;
- Provide access to employment and training activities related to customized training, fee for service based training, and for individuals with disabilities;
- Provide access to programs and activities carried out by the required system partners;



# OMJ Operator Procurement



## Local Workforce Development Board Responsibilities:

The local system must(continued):

- Provide access to the data, information, analysis and all job search, placement, recruitment, and other labor exchange services under the Wagner-Peyser Act;
- At a minimum, make each of the required partner programs, services, and activities accessible at not less than one (1) physical center in each local area.
- Co-locate Wagner-Peyser services in OMJ Centers.
- Use common system identifiers, including the state’s “OhioMeansJobs”, and the federal “American Job Center” brand.

The local system may make programs, services, and activities available through:

- A network of affiliated sites that can provide one or more of the required programs to individuals; and/or through



# OMJ Operator Procurement



## **Local Workforce Development Board Responsibilities:**

The local system may make programs, services, and activities available through (continued):

- A network of eligible OMJ Center partners at an affiliated site that consists of a physical location or an electronically or technologically linked access point that assures availability of career services regardless of where the individuals enter the statewide workforce development system.
- Specialized centers to address special needs, such as the needs of dislocated workers, youth, or key industry sectors; and
- Electronic means in a manner that improves efficiency, coordination, and quality in the delivery of partner services.



# OMJ Operator Procurement

---

## Local Workforce Development Board Vision:



The board vision for the Operator's roles and responsibilities should reflect what is identified in the local and regional plans . The needs of business and the needs of individuals for a local area need to be taken into consideration. The board's vision and mission statements should be used as the overall guiding principle for the OMJ Center Operator.



# OMJ Operator Procurement

---

## Relationship between the Local Workforce Development Board and the OMJ Center Operator:

As the local workforce development board is responsible for oversight and management of the OMJ Center Operator the board must decide if it will:

- Maintain an advisory role, providing direction to the OMJ Center Operator with expectations that the Operator will carry out the activities needed to fulfill the board's directives with the authority and decision making ability to do so;
- Commit local board staff to maintain an active role in managing the operator and being involved in daily decisions for which a management structure will need to be clearly defined; or
- A combination of both.





# OMJ Operator Procurement



## **Relationship between the Local Workforce Development Board and the OMJ Center Operator:**

This decision will affect the relationship and standards for communication and interaction between the board and the operator. The board will also need to decide if the operator will be involved in systemic activities such as:

- Strategic planning, outreach planning, service planning or other planning activities;
- Engagement, recruitment, management, and servicing of business; and
- Policy recommendations.

All of these decisions by the local workforce development board will define the relationship with the operator and how the local OMJ Center delivery system will be managed.

# OMJ Operator Procurement

## Procurement of the OMJ Center Operator:



WIOA 121(d)(2)(a) requires that the OMJ Center Operator shall be certified through a competitive process. The local workforce development board will need to decide how that procurement will take place. The local board may conduct the procurement process directly using board staff or perhaps the local board will work with a local agency or contractor to accomplish this task. If working with another entity the local board must ensure there is no conflict of interest with that entity regarding their involvement. The local board must also ensure that all local, state and federal procurement requirements are followed.



# OMJ Operator Procurement



**Operator Responsibilities-** As defined by the local board including but not limited to:

- The number of physical sites the Operator will be responsible for managing, including hours of operation;
- Technological resources such as the local system website, case management software, business networking software, or online testing sites that the Operator will use and/or maintain;
- Management of the daily operational costs and the relationship with the WIOA fiscal agent for remittance of invoices;
- Management and coordination of the partner services;
- Coordination with youth service providers;



# OMJ Operator Procurement



**Operator Responsibilities-** As defined by the local board including but not limited to (continued):

- Management of employer services;
- Number of staff expected to operate the system;
- Basic career services the Operator will be assigned to perform (orientations, assessments);
- Maintaining a referral system with the partners;
- Compliance with federal and state regulations pertaining to EEO responsibilities, customer complaints, and accessibility;
- Implementation of board policies;
- Operation of the resource room and/or computer labs;



# OMJ Operator Procurement



**Operator Responsibilities-** As defined by the local board including but not limited to (continued):

- Meeting performance goals and measures;
- Preparation and submission of annual operating budgets;
- Reporting to the board on a regular basis;
- Continuous improvement activities (customer satisfaction); and
- Use of site(s) by the community.

**Optional Responsibilities-** if defined by local board:

- Coordination and management of the local workforce development system MOU;



# OMJ Operator Procurement



## **Optional Responsibilities-** if defined by local board (continued):

- Entering into lease agreements for the physical sites;
- Providing career services under the adult and dislocated worker programs;
- Training for partners;
- Fee for service activities;
- Outreach and recruitment of customers and voluntary partners;
- Grant proposals through non-profit, governmental, or private organizations; and
- Membership with local associations, participation on workgroups, task forces, etc.



# OMJ Operator Procurement



## **Non-Permissible Operator Responsibilities:**

- Convene system stakeholders to assist in the development of the local/regional plan;
- Prepare and submit local plans;
- Be responsible for oversight of itself;
- Manage or participate in the competitive selection process for Operators;
- Select or terminate OMJ Center Operators, career services, and youth providers;
- Negotiate local performance measures; and
- Develop and submit budget for activities of the local board.

# OMJ Center Operations

## Part 3. Request For Proposals





# Section 1 – General Purpose

---

Purpose

Background

Overview

Objective(s)



# Section 2 – Procurement Process

---

## Timetable

Estimated release date

Question/answer (clarification) period

Due dates/times/location (specifics)

Review period

Award announcement

Protest period

Contract period

Miscellaneous



# Section 2 – Procurement Process

---

Question/answer (clarification) in detail

Communications prohibitions

Resources/Vendor library



# Section 3 – Vendor Experience and Qualifications

---

Mandatory criteria

Organizational experience/qualifications/capabilities

Staff experience/capabilities

Key staff requirements



# Section 4 – Scope of Work/Specification of Deliverables

---

## Technical proposal

- Proposed work plans/SOW

- Administrative structure

- Specification of deliverables

- Compensation structure



# Section 5 – Format and Submission

---

Submission information

Format/organization

Cost proposal

Disqualifiers



# Section 6 – Evaluation/Scoring

---

Initial qualifying criteria

Technical proposal scoring criteria

Cost proposal scoring criteria

Review process/caveats

Award/denial process



# Section 7 – Protest Procedures

---

Description

Timeframes

Related caveats



# Section 8 – Other Conditions/Requirements/Caveats



- Contract/agreement requirements
- EEO/Accessibility requirements
- Trade secret prohibition
- Public information disclaimer
- Travel limits/restrictions (if applicable)
- Confidentiality
- Ethics/conflicts of interest
- Waiver of minor errors
- Prevailing wage/other DOL requirements



# Section 8 – continued

---

## Affirmations

ORC 9.24 Finding for recovery

Current/prior contract performance

Federal debarment (SAM)

Disclosure of work locations

Offshore services prohibition

Proposal as public record

Ownership of deliverables/intellectual materials



# Section 9 – Attachments/Appendices

---

Glossary of terms

Forms

# OMJ Center Operations

## Part 4. OMJ Center One-Stop System Certification



# OMJ System Certification

## WIOA Requirements §121(g)

In order to receive infrastructure funding, One-Stop centers must be assessed and certified at least once every three (3) years.

The State Board, in consultation with chief local elected officials and local boards, establishes the objective criteria to be used.

One-Stop Certification is carried out by the local board.

# OMJ System Certification

Criteria & procedures for certification shall include:

- Standards relating to service coordination among the partners
- Factors relating to the effectiveness, accessibility, and improvement of the One-Stop delivery system
- Achievement of performance measures
- Integration of available services
- Meeting the needs of local employers and participants

# Certification Workgroup

- Comprised of multiple partners
- Approach based on TEGL 4-15 – “Vision for O.S. System and WIOA”
- Uses established benchmarks and critical success factors updated from the Gold Standard Program
- A locally selected review team with peer members conduct desk and on-site review
- Site must be ADA approved prior to requesting certification from local board
- Incorporates partner activities such as Mystery Shopping and Data Provision

# OMJ System Certification

Local areas may include additional measures related to their delivery of services.



# Phased Approach

**Phase I** - Review of one comprehensive center per area and of overall system services against limited set of “must pass” standards

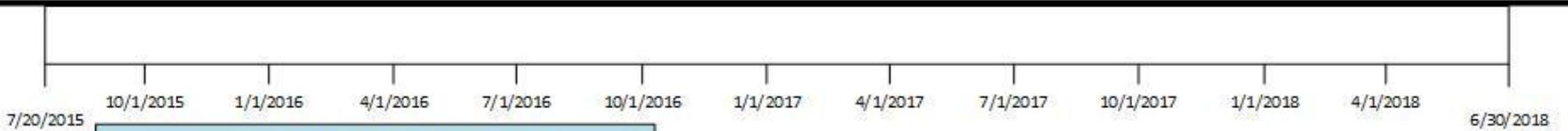
**Phase II** - Affiliate and specialized centers included in quality review of entire system using all benchmarks

**Phase III** – Continuous improvement activities based on a balanced scorecard type approach

Quality of services for both businesses and individuals constant in all phases

Benchmarks document (draft) available for O.S. Operator RFPs

# Ohio One-Stop Certification Process Timeline (tentative)



## Phase One – Conditional Certification

ID	Task Name	Start	Finish	Duration	Q3 15			Q4 15			Q1 16			Q2 16			Q3 16					
					Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep					
1	Create Phase 1 Materials and Benchmarks	9/1/2015	11/30/2015	13w	█																	
2	Training on Phase 1 Materials	11/30/2015	1/29/2016	9w				█														
3	Local Boards begin Phase 1 Reviews	1/1/2016	6/30/2016	26w							█											
4	Finalize Phase 1 Reviews – Issue Resolution	4/15/2016	9/30/2016	24.2w										█								
5	Develop Phase 2 Materials	11/2/2015	9/30/2016	48w				█														

## Phase Two- Quality Review Certification

ID	Task Name	Start	Finish	Duration	Q3 16			Q4 16			Q1 17			Q2 17			Q3 17			Q4 17		
					Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	Implement Data Collection Methods	7/1/2016	12/29/2017	78.2w	█																	
2	Training on Phase 2 Materials	10/3/2016	12/30/2016	13w				█														
3	Local Boards begin Phase 2 Reviews	1/2/2017	6/30/2017	26w							█											
4	Finalize Phase 2 Reviews – Issue Resolution	7/3/2017	12/29/2017	26w													█					
5	Develop Phase 3 Materials	9/1/2016	4/28/2017	34.4w				█														

## Phase Three – Continuous Improvement

ID	Task Name	Start	Finish	Duration	Q2 17			Q3 17			Q4 17			Q1 18			Q2 18		
					Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
1	Continue Data Collection Methods	4/3/2017	6/29/2018	325d	█														
2	Training on Phase 3 Materials	10/2/2017	12/29/2017	65d							█								
3	Review of Phase 2 Implementation	10/2/2017	1/1/2018	66d							█								
4	Implement Phase 3 Balanced Scorecard	1/1/2018	6/28/2018	129d										█					
5	Continuous Improvement Activities	1/1/2018	6/29/2018	130d										█					

# OMJ Center Operations

## Part 5. Panel Presentation



# Questions?

**Ron Weber**

- **614-644-0821**
- **Ronald.Weber@jfs.ohio.gov**

**Kip Crist**

- **614-466-7291**
- **Kip.Crist@jfs.ohio.gov**

**Jay Easterling**

- **614-728-5693**
- **Jay.Easterling@jfs.ohio.gov**

**Tom Hutter**

- **614-466-9466**
- **Tom.Hutter@jfs.ohio.gov**