



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
WWV11865

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF
FRANK WHITTAKER 804-558-2316

PROPERTY

Center for Regional Competitiveness
 Attn: Kenneth Poole
 1700 N Moore Street Suite 2225
 Arlington VA 22209

SHIP TO

BUREAU OF EMPLOYMENT PROGRAMS
 OFFICE OF ADMIN. SUPPORT-5302
 112 CALIFORNIA AVENUE
 CHARLESTON, WV
 25305-0112 558-2634

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
07/14/2010				

BID OPENING DATE: 08/12/2010 BTD OPENING TIME 01:30PM

LINE	QUANTITY	UCP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		961-20	145 ⁰⁰	116,092
<p>CONSULTING SERVICES.</p> <p>THE WEST VIRGINIA PURCHASING DIVISION, FOR THE AGENCY, WORKFORCE WEST VIRGINIA, IS SOLICITING BIDS FOR CONSULTING SERVICES FOR THE REGIONAL INNOVATION GRANT PER THE ATTACHED SPECIFICATIONS.</p> <p>ALL TECHNICAL QUESTIONS MUST BE SUBMITTED IN WRITING TO FRANK WHITTAKER IN THE WV PURCHASING DIVISION VIA EMAIL AT FRANK.M.WHITTAKER@WV.GOV OR VIA FAX AT 304-558-4115. DEADLINE FOR TECHNICAL QUESTIONS IS 07/26/10.</p> <p>EXHIBIT 3</p> <p>LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE ON AND EXTENDS FOR A PERIOD OF ONE (1) YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE ORIGINAL CONTRACT. THE "REASONABLE TIME" PERIOD SHALL NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS WRITTEN NOTICE.</p> <p>UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT, THE TERMS, CONDITIONS AND PRICING SET HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT.</p> <p>RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL</p>						

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 2010 AUG 11 A 10:29
 PURCHASING DIVISION
 STATE OF WV

SEE REVERSE SIDE FOR TERMS AND CONDITIONS			
SIGNATURE <i>Kenneth Poole</i>	TELEPHONE 703 522 4980	DATE 8/10/10	
TITLE President/CEO	FEIN 54-1968125	ADDRESS CHANGES TO BE NOTED ABOVE	

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



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<p>WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR, SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30) DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS.</p> <p>CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.</p> <p>OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)</p> <p>QUANTITIES: QUANTITIES LISTED IN THE REQUISITION ARE APPROXIMATIONS ONLY, BASED ON ESTIMATES SUPPLIED BY THE STATE SPENDING UNIT. IT IS UNDERSTOOD AND AGREED THAT THE CONTRACT SHALL COVER THE QUANTITIES ACTUALLY ORDERED FOR DELIVERY DURING THE TERM OF THE CONTRACT, WHETHER MORE OR LESS THAN THE QUANTITIES SHOWN.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p> <p>THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Kevin Spivey</i>	TELEPHONE 703 522 4980	DATE 8/10/10
TITLE President/CEO	FEIN 541968125	ADDRESS CHANGES TO BE NOTED ABOVE

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<p>SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY ELECTRONIC MEDIUM SUCH AS CD-ROM.</p> <p>REV. 05/26/2009</p> <p>NOTICE</p> <p>A SIGNED BID MUST BE SUBMITTED TO:</p> <p>DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130</p> <p>THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:</p> <p>SEALED BID</p> <p>BUYER: -----</p> <p>RFQ. NO.: -----</p> <p>BID OPENING DATE: -----</p> <p>BID OPENING TIME: -----</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Andrew Pool</i>	TELEPHONE 703 522 4980	DATE 8/10/10
TITLE President/CEO	FEIN 54 1968125	ADDRESS CHANGES TO BE NOTED ABOVE

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PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID: 480-393-5098 XXXXXXXXXX CONTACT PERSON (PLEASE PRINT CLEARLY): KENNETH E POOLE, CEO ***** THIS IS THE END OF RFQ WWV11865 ***** TOTAL:						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Kenn E Poole</i>	TELEPHONE 703-5224980	DATE 8/10/10
TITLE President/CEO	FEIN 54-1968125	ADDRESS CHANGES TO BE NOTED ABOVE

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WORKFORCE WEST VIRGINIA
Cost Proposal/Bid Sheet for RFQ WWV-11-865
(Regional Innovation Grant Consultant)

Name of Proposing Firm or Vendor:

Center for Regional Economic Competitiveness

Task	Number of Hours*	Rate per hour	Total Proposed Cost
Entrance Conference (3.4 a.)	40	\$240.08	\$ 9,603
Consulting Report including SIP and feasibility studies (3.4 b. 1-8)	200	112.50	22,500
Physical and electronic copies of work papers (3.4 c.)	16	112.50	1,800
Three (3) on-site consultations (3.4 g.)	24	353.80	8,486
Power Point presentation of SIP (3.4.f)	40	125.00	5,000
Review or assist in marketing or promotional items (3.4.k)	40	150.00	6,000
Monthly status reports (3.4 i)	240	125.00	30,000
Analyze analysis software (3.4.l)	160	150.00	24,000
Exit Conference (3.4 h.)	40	217.58	8,703
Grand Total	800	145.12	116,092 **

*Number of hours provided above are for calculation and comparison purposes only and are not intended to reflect the number of hours projected to complete each task listed.

Note: The hourly rates listed are considered firm for the life of any purchase order that results from this RFQ.

Ancillary expenses (travel, meals, lodging, etc.) are to be included in Total Proposed Cost and proposed hourly rates.

**Bid award will be based on the Grand Total of the Total Proposed Costs



1700 N. Moore Street, Suite 2225
PO Box 100127
Arlington, VA 22210
703-522-4980
www.creconline.org

August 10, 2010

Mike Herron
Director of Advantage Valley
c/o Frank Whittaker, Buyer
Purchasing Division
2019 Washington Street, East
PO Box 50130
Charleston, WV 25305-0130

Dear Mr. Herron

It is with great pleasure that the Center for Regional Economic Competitiveness (CREC)—in collaboration with the University of Northern Iowa's Institute for Decision Making (IDM)—submit the enclosed proposal to RFQ WWV-11-865. Nationally, CREC has worked on helping five different regions in developing Regional Innovation Grant (RIG) strategies as they sought to integrate workforce and economic development. These projects used many of the US Department of Labor (DOL) Workforce Innovation in Regional Economic Development (WIRED) principles and have been instrumental in helping those regions generate focus for their workforce development and economic development efforts as well as leverage funding from other sources.

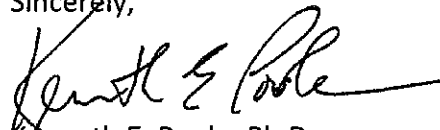
Our proposal details how we would help Advantage Valley in developing its own customized regional strategy. Our role in supporting Regional Innovation Grant-sponsored planning efforts in the Cedar Valley of Iowa, the Texoma region of Texas/Oklahoma, the Siouxland region of Iowa/South Dakota/Nebraska, the Future Forward region of western North Carolina, and the Upper Rio Grande region of western Texas demonstrates our understanding of the DOL WIRED principles and the opportunities that regions can leverage through their RIG planning process. Our award-winning work with the bi-state Texoma (in northern Texas and southern Oklahoma) Regional Consortium demonstrates our ability to engage stakeholders from a large multi-state region. Our eight continuous years of work in helping leaders of the Future Forward region of western North Carolina demonstrates our commitment to remaining involved as regions undergo their own unique transformations. Our repeat work in Texoma, El Paso, and western North Carolina reflect the satisfaction that our clients have with the quality and innovativeness of our work. And our efforts in developing and implementing national training developed FROM our work FOR workforce and economic development professionals illustrate our commitment to continuously improving and contributing to our common profession.

This proposal is aimed at responding to the Advantage Valley's needs as described in the Request for Quotations, but we believe that an important part of this engagement will be working closely with you to ensure that we design an effort that helps the Advantage Valley Core Leadership team achieve its primary objectives. CREC is a national leader both in developing techniques for understanding economic and labor market opportunities as well as facilitating fact-based strategies that are implementable and can be used to leverage funding from a variety of federal, state, local, and philanthropic sources.

But most importantly, our team (especially CREC and IDM) fully appreciates the importance of this project to you. It is one your true opportunity to engage leaders in research and analysis that contributes substantially to a deliberative dialogue and a decision making process that can lead to long-term strategic direction. It is vital that the consulting team you choose can deliver on a strategy that will ultimately energize your area leaders to move forward. We believe the best way to achieve this kind of planning process success is for area leaders to "own" the plan completely. So, we have laid out a process that is uniquely designed to accomplish that goal. However, many unknowns will occur during this process. The true value of your facilitation team will be in how well they are able to adapt and help the Advantage Valley leaders respond to your unique circumstances and build momentum for action. For that, there is no substitute for experience and expertise in both the data analysis as well as the process facilitation elements of this proposed effort. We think that is our team's true competitive advantage.

We look forward to the opportunity to work with the Advantage Valley core leadership team and other leaders in the tri-state region. Please contact us if you have further questions.

Sincerely,

A handwritten signature in black ink, appearing to read "Kenneth E. Poole". The signature is fluid and cursive, with a long horizontal stroke at the end.

Kenneth E. Poole, Ph.D.

President

Center for Regional Economic Competitiveness

ADVANTAGE VALLEY REGIONAL INNOVATION STRATEGY PROPOSAL

Prepared for:
Advantage Valley Core Leadership Team and Workforce West Virginia

Submitted August 10, 2010

Submitted by:

1700 N. Moore Street, Suite 2225
PO Box 100127
Arlington, VA 22210
703-522-4980, ext. 1016
www.creconline.org

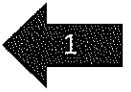
Kenneth E. Poole, Ph.D., President/CEO – kpoole@c2er.org



113 Business & Community Services
Bldg
University of Northern Iowa
Cedar Falls, IA 50614-0186
www.bcs.uni.edu/idm



BACKGROUND FOR RFQ RESPONSE



Tapping U.S. Employment and Training Administration (ETA) Regional Innovation Grant (RIG) funding, the Advantage Valley seeks to develop a regional strategy aimed at building a more skilled and adaptable workforce. The strategic implementation plan from this RIG would develop a talent pipeline that better matches the requirements of industry expected to grow in the area with the outcome of the region's education and training. Area leaders believe that it will be particularly important to enhance the Science, Technology, Engineering and Math (STEM) skills as part of this plan.

Following the principles outlined in ETA's WIRED framework, the Valley has already begun the process of organizing its core leadership team around this strategy. As noted in the RFQ, the leadership represents 12 counties in a tri-state region of western Appalachia. Those counties include Kanawha, Putnam, Cabell, Boone, Clay, Lincoln, Mason, and Wayne in West Virginia; Boyd, Carter, and Greenup counties in Kentucky; and Lawrence County in Ohio. As defined in the RFQ, the core leadership team is made up of two regional WIB directors in WV, one from KY, regional economic development authority directors in all three states, a representative of the WV Manufacturer's Association, a representative of the WV Dept of Education, and a representative from a community college in KY. The Chairman of the group is Mike Herron, director of Advantage Valley. The Advantage Valley Core Leadership Team provides a solid foundation for moving forward, but we anticipate that this team will also seek to engage a broader group of strategic advisors (including business leaders and other stakeholders) who can help with planning and implementation efforts.

Advantage Valley leadership seeks to create a strategy designed to address the challenges of worker dislocation as well as to support the development of a talent pool that will foster economic development in the region. To achieve this strategy, the Leadership and Advisory Teams plan to participate closely with the consulting team in identifying a core economic rationale for targeting the region's workforce investments in support of key leverage points (determined through a SWOT analysis). The plan will seek to leverage not only Workforce Investment Act dollars, but also those resources available from a wide variety of activities including those implemented by the region's educational institutions and its economic development partners. The resulting strategy would be designed to help return the unemployed to work and help existing workers upgrade their skills as a way to retain their jobs in the face of economic restructuring and technological change.

In the Request for Quotations (WWV11865), the leadership team and its supplemental advisory team are asking for consulting services to support the development of that strategy. The purpose of this document is to:

- I. Describe the capabilities of the Center for Regional Economic Competitiveness and its partner at the Institute for Decision Making in providing similar services successfully as part of RIG projects (and other strategic planning efforts) elsewhere
- II. Provide an overview of the work plan that CREC/IDM would implement to help Advantage Valley accomplish its goals
- III. Describe the budget requirements for implementing that work plan as outline in the RFQ and this proposal

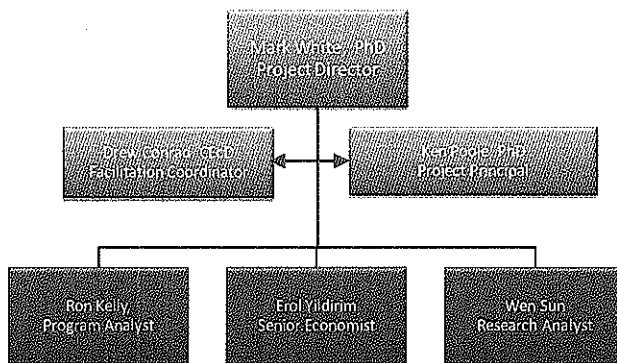
I. ABOUT THE PROJECT TEAM

The Center for Regional Economic Competitiveness (CREC) is a 501(c)3 nonprofit organization based in Arlington, VA. CREC has been involved in helping five other **Regional Innovation Grant** projects in locations across the US. In three cases, we collaborated with the Institute for Decision Making (IDM), a division of the University of Northern Iowa based in Cedar Falls, IA, and we are proposing to work together again in support of the Advantage Valley RIG.

Mandatory Selection Criteria

Capacity to Conduct the Scope of Work Described in the RFQ

The CREC has the capability and staff to conduct the work and prepare the reports as outlined in the Request for Quotations. CREC has 10 professional staff, nine of whom have masters' degrees or PhDs in related fields. Supplementing that effort, CREC also engages a team of four senior research or senior policy fellows to provide assistance on strategic planning and policy engagements.

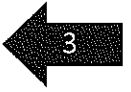


Dr. Mark White, Vice President for Research, will serve as the project director and Dr. Kenneth E. Poole, CEO of CREC will serve as a Project Principal and the co-project director. Both work at CREC and have been undertaking RIGs during the past three years. From IDM, Drew Conrad, Sr. Program Manager, will assist the project team in facilitation activities and in developing strategic recommendations. Mr. Conrad

has also conducted multiple RIGs during the past two years. Additionally, CREC has assigned Ron Kelly to provide research analysis and facilitation support. Mr. Kelly has managed the Labor Market Information Training Institute as well as supported Arizona's DOL-funded State Energy Sector Partnership grant during the past year, providing research and instructional support to the Institute and several state labor market information agencies and their data users. Supporting this team will be Erol Yildirim, CREC's chief economist and information technology specialist, and Wen Sun, an analyst for CREC, will both provide quantitative research support.

Experience in Planning to Help Transition Dislocated Workers

CREC and IDM have conducted numerous consulting projects and strategic planning projects designed to help identify transitional employment opportunities for dislocated workers. Since 2003, CREC has been working with leaders in 12 counties and three workforce development boards in western North Carolina where significant employee dislocation has occurred as a result of job losses in the textile and furniture industries. In that project, CREC identified



strategic opportunities in key industry clusters and helped to promote efforts to develop the education and training required for workers to make the transition. One key outcome was the formation of an engineering technology center with nearly \$2 million in financial support from local businesses, area universities and community colleges, and federal government. In this same region, CREC is currently working with DCA Consulting on a RIG (funded for the 2010-11 timeframe) for the Future Forward Workforce Alliance (FFWA). The FFWA RIG is designed to create a strategic implementation plan to promote post-secondary career and technical education to at-risk youth and dislocated adults in targeted industries. It follows up several prior regional projects including one 2008 in which CREC facilitated the development of a memorandum of understanding regarding strategic collaborations planned among three workforce boards and a regional economic development partnership.

In 2008-09, CREC and IDM collaborated to develop a regional workforce plan under a RIG in the six-county Cedar Valley Region of Iowa in the state's eastern farm belt (where IDM is located). The plan was to design to create a talent pool for the region's traditional manufacturing base and critical expanding sectors including business services, renewable energy and healthcare. That project was followed in 2008-09 with a second collaboration in the Siouxland region – a three-state 11-county RIG involving a workforce area in northwest Iowa, southeast South Dakota, and northeast Nebraska. The South Dakota and Nebraska areas were part of "balance of state" regions which meant that the staff was employed directly by the state. The key issue in this food processing region was the alignment of very different workforce policies across state boundaries, including developing articulation agreements among competing colleges, engaging the University of South Dakota in the Sioux City metro area (where no other major state university exists), and preparing area incumbent workers for anticipated technological innovations in the food processing industry.

Also, in 2008-09, CREC collaborated with Workforce Strategy Center, a New York-based nonprofit consulting organization, to develop a strategic workforce plan for the six-county workforce area centered on El Paso, Texas and its rural outlying counties. The project, which covers nearly 22,000 square miles, included strategies for the urbanized area of El Paso, building on its transportation and defense assets, and a different set of strategies for the rural parts of the region designed to tap its tourism, border protection, renewable energy, and entrepreneurial assets.

In 2009-2010, CREC and IDM again collaborated on a project in the Texoma region (two workforce boards serving 13 counties in northern Texas and southern Oklahoma – north of Dallas). In that project, CREC had been involved in helping to develop an earlier Texas Workforce Commission strategy for the same counties in 2006-07. The area leaders asked CREC to return to help re-invigorate the region's cluster initiative by revisiting the selection of the region's priority clusters and developing a strategic implementation plan for each of four or five cluster priorities. The team used the plan to help Southeastern Oklahoma State in developing its work plan for a US Economic Development Administration-funded university center to manage the on-going implementation efforts.

Personnel Education Requirements

Dr. Mark C. White earned his Ph.D. in Regional Geography from the University of Miami in 2002. He is currently serving as an instructor for the Council for Community and Economic Research (C2ER), helping to develop training curriculum and instructional material on using data to drive strategic planning decision-making. He also developed instructional material and served as a trainer for CREC's US EDA training program, "Know Your Region" and has delivered that training in several places, including a two-day retreat in western North Carolina. He is also conducting training for the Iowa labor market information agency on understanding the job opportunities likely to emerge from the green economy.

Dr. Kenneth E. Poole has a Ph.D. in Regional Development Policy from the George Mason University's School of Public Policy. He earned that degree in 2000 after 17 years of experience in the field. He recently developed different professional development training modules (most extending to two days each) for the National Association of Workforce Boards, the US Economic Development Administration, and the International Economic Development on how best to integrate economic and workforce development.

Mr. Drew Conrad has his Certified Economic Developer (CEcD) designation from the International Economic Development Council, and his credentials are up-to-date. He holds a Masters in Public Policy and has 17 years of economic development experience having worked with client communities across Iowa and the Midwest, as well as with the US EDA, US Department of Agriculture, Iowa Workforce Development, Iowa Department of Economic Development, investor-owned utilities and rural electric cooperatives. He is a past president of the Professional Developers of Iowa and currently serves on the C2ER Board of Directors. He recently served as a co-instructor (and co-curriculum developer) with Dr. White for a C2ER-sponsored training program on determining your workforce advantage.

Pending or Recent Litigation

CREC has never been involved in any litigation activities or been cited by any government regulatory body.

Quality Control Review

CREC provides references to all of its past clients. None have reported negatively on our work and in fact many of our current projects involve repeat business with past clients.

References

Recent references for work engaging workforce, economic development, and education leaders in collaboration.

Siouxland Regional Innovation Grant – Sioux City, IA

Julie Stoik, WF Director/Denise Rathman, Regional Workforce Innovation Director, Western Iowa Tech Community College 712-274-8733; Julie_Stoik@witcc.edu

Georgia WorkReady Regions, State of Georgia – (assisting 16 multi-county workforce regions in developing strategic plans and generating data to support those plans)

Debra Lyons, Director, Governor's Office of Workforce Development, Atlanta, GA 404-463-5283 dlyons@gov.state.ga.us

Future Forward Workforce Alliance Regional Innovation Grant –
3 western North Carolina workforce development boards

*Sheila Dotson: Workforce Development Director, Western Piedmont Workforce Development Board, 828-485-4218 Sdotson@wpcog.org
Carol Coates: Director, High Country Workforce Development Board, 828-265-5434 x130 ccoates@regiond.org
Bill Robertson, Director, Isothermal Workforce Development Board, 828-287-0262 ext.1245 brobertson@regionc.org*

Texoma Regional Innovation Grant – Sherman, TX / Durant, OK

*Kathy Hendricks, Economic Development Director, Southeastern Oklahoma State University, Durant, OK 580-745-2046 khendrick@sosu.edu
Janie Bates: Executive Director, Workforce Texoma janie.bates@twc.state.tx.us;
Bob Rhoden: Business Services Manager, Workforce Texoma bob.rhoden@twc.state.tx.us 903-957-7408*

Timely Delivery of Reports

CREC works closely with its clients to ensure on-time delivery. If in starting the project, we think timelines should be adjusted, we discuss that with the client and develop mutually agreeable schedules. In this instance, the timeline as outlined in the RFQ seems reasonable to achieve the desired objective. We may wish to discuss the staging of certain project activities to reflect the realities of stakeholder engagement (i.e., they are not available during holiday periods in late November and late December or they may need sufficient time – typically 4-6 weeks between working sessions – to “process” the results of the previous meeting.

Experience in Providing RIG Projects Similar to the Services Being Requested

CREC has conducted two multi-state Regional Innovation Grants – one in Iowa-South Dakota-Nebraska and another in Texas-Oklahoma. In addition, CREC has conducted (or is conducting) three other RIGs in North Carolina, Iowa, and Texas.

Furthermore, CREC developed similar strategies without RIG funding in several multi-county regions including projects in North Carolina, Virginia, Georgia, Tennessee, Arizona, and Texas. For instance, during the past three years, CREC helped regional leaders in 16 multi-county regions in Georgia to develop their strategic plans for a state-funded WorkReady initiative that follows the WIRED principles. CREC also helped a region in southern Arizona engage its core leadership team in facilitated discussions designed to develop a successful WIRED application. In addition, CREC recently conducted a case study assessment and prepared a benchmarking report as part of the wrap up of the SEVA-Port WIRED region in the Hampton Roads area as well as facilitated the development of a regional economic strategy for the greater Roanoke, Virginia area. Many of the regions that CREC has helped have been rural or small metro areas seeking to identify potential economic growth opportunities that could provide jobs to dislocated workers.

Since its inception in 1987, CREC's partner, IDM, has assisted a variety of multi-county regions, including multi-state efforts. IDM assistance included strategic plan development, workforce development strategy development, marketing plan development, target industry analysis, cluster analysis, organizational development and implementation technical assistance. These clients have included regions which encompassed entirely of rural counties and regions which where a mix of rural and metro counties. These client regions have included counties in Iowa, Illinois, Nebraska, South Dakota and Wisconsin.

More details regarding these projects are included in the organizational capabilities statement below.

Knowledge of the Workforce Investment Act

CREC staff follows WIA closely and has advocated on behalf of the program at DOL and in Congress. In addition, CREC has implemented several RIGs, workforce development strategies, and other projects, including a State Energy Sector Partnership grant for the State of Arizona. All of these projects either used or leveraged WIA dollars to implement key strategies. For instance, CREC developed data-driven workforce strategies in Durham, NC, and Racine, WI, for each of their WIA-funded workforce development centers.

CREC has also developed curriculum and conducted workforce board staff training designed to provide workforce staff with advice and counsel on how to use WIA and other funds to support workforce and economic development initiatives. That training includes a pre-conference workshop held at the National Association of Workforce Board conference in 2008.

Consultant Team Members with 1+ Year Experience with Workforce Investment

Mark White, Project Director

- 6 years of WIA-related consulting (as part of 10 years of economic and workforce development experience)



- Multi-organizational strategic planning (including planning for four RIGs, workforce development operational planning, data analysis of impacts on dislocated workers, instruction on the use of labor market information for workforce programming and planning, and program evaluation (including 1 WIRED region)

Ken Poole, Project Principal and Co-Project Director

- 8 years of WIA-related consulting (as part of 27 years of economic and workforce development experience)
- Multi-organizational strategic planning (including planning for five RIGs), workforce board retreat facilitation and operational planning, program investment planning, and strategic partnership building (including work for 3 WIRED regions)

Drew Conrad

- 4 years of WIA related experience (as part of 17 years of economic and workforce development activities)
- Facilitation and research support for the three RIGs and a regional workforce strategy for a community college district and regional workforce investment board

Ron Kelly

- 1 year of WIA-related consulting (as part of 3 years of workforce and economic development experience)
- Focused on linking labor market information to workforce development planning and operations; organizing and implementing training on workforce information for analysis and counseling

Wen Sun

- 1 year of data analysis for workforce development (as part of 3 years of regional economic and workforce analysis)
- Focused on conducting analysis using a wide array of labor market and regional economic statistics to be used in workforce planning; analyzing data regarding dislocated workers provided by local workforce boards

Erol Yildirim

- 1 year of working on workforce development projects (as part of 12 years of experience in regional economic analysis and 7 years of web design/information technology projects for economic and workforce development organizations)

Organizational/Personnel Experience in Facilitating Regional Strategies

The Center for Regional Economic Competitiveness (CREC) will serve as the prime contractor for this engagement. The Institute for Decision Making (IDM) at the University of Northern Iowa will serve as a subcontracting partner.

Center for Regional Economic Competitiveness



Created in January 2000, CREC's mission is to promote knowledge-based regional economic development efforts through research, training, and consulting services. The Center achieves its mission by undertaking efforts to (a) understand the economic forces impacting regions and localities, (b) assist local leaders in formulating knowledge-based strategies, and (c) develop transformational models that support knowledge-driven economic prosperity.

CREC efforts are aimed at helping institutions responsible for developing regional economies implement strategies that help to create and fill knowledge economy jobs. The Center helps these organizations achieve their vision by providing better information about regional economies and a framework for creating a local consensus on strategic direction. This complements our sister organization, the Council for Community and Economic Research—a national membership organization of researchers and analysts focused on training and technical assistance in how data and analysis can be better integrated into the strategy development process.

CREC staff focuses on designing and implementing technical assistance, training, and networking tools for community and economic researchers, economic and workforce development practitioners, as well as federal, state, and local policy leaders. These efforts are aimed at enhancing the use of methods and tools for understanding local economies. Key activities involve designing regional strategies and conducting regional industry, cluster, and labor market analyses. The staff has completed economic and numerous workforce development strategies and related research projects for public and non-profit clients at the federal, state, regional, and local level in places across the US – from Maine to Hawaii and from Alaska to Florida.

In 2006-07, CREC served as a partner in helping to develop the Texoma Regional Strategy – an effort recognized with an award from the Southern Growth Policies Board as being one of the most innovative initiatives. More recently, CREC has been involved in developing strategies for several regions, including US Department of Labor-funded Regional Innovation Grants in the Cedar Valley (Waterloo and Cedar Falls, Iowa) and the Siouxland (a tri-state region involving 11 counties surrounding Sioux City, IA, South Sioux City, NE, and North Sioux City, SD). In addition, CREC has also worked with a RIG project in the Upper Rio Grande region of west Texas that includes El Paso and five other more rural counties.

CREC has been a leader involved in linking workforce and economic development, aiding the Governor's office in Georgia in developing groundbreaking strategies to provide "work ready certifications" to thousands of individuals in 16 different regions of that state. Also, CREC recently completed a seven-year project with the Future Forward region of western North Carolina, helping to establish a new engineering technology center and develop a new regional higher education advisory board that links two-year and four-year postsecondary curriculum planning.

CREC has continued to enhance the economic research capabilities that it demonstrated in developing the cluster study for Texoma by designing a model for assessing labor market supply and demand in targeted industry clusters. That work has been tested through recent projects in Nashville, Hawaii, Sarnia-Lambton (Ontario, Canada), and Fayetteville, NC. In addition, CREC continues to aid regions in using economic and workforce research to guide policy and practice as demonstrated in our RIG-related efforts.

Furthermore, CREC has demonstrated to many organizations that it can be a valuable asset in analyzing and facilitating region strategies. In fact, several different national and regional organizations – including the US Economic Development Administration, the California Association for Economic Development, and the Southern Economic Development Council (among others) – have turned to CREC staff to train community leaders on how to conduct applied research that can be used effectively in strategic economic planning.

Institute for Decision Making, University of Northern Iowa

For over 20 years, the Institute for Decision Making (IDM) at the University of Northern Iowa has assisted communities, local and regional development groups in helping their shared visions become realities. IDM guides organizations and community-based groups as they make decisions and take organized action toward economic and community development results. IDM's approach remains focused on helping each region and community identify and understand its unique set of issues and opportunities. Each interaction with a regional or community client is carefully tailored to develop innovative and practical development strategies to meet their needs. IDM's staff of economic development professionals serves and advises economic development corporations, chambers of commerce, convention and visitors' bureaus, community planning groups, and other similar groups and organizations.

In addition to serving regions and communities, IDM expands learning experiences for the University community, professionals and volunteers by sharing expertise and organizing professional educational opportunities. Annually, IDM serves over 50 regional and community partner clients and has served more than half of the communities in Iowa since its inception.

IDM is a program of the University of Northern Iowa's Business and Community Services, a division of the College of Business Administration. As such, IDM and its staff operate within standard University policies and procedures, and are located on the UNI campus in Cedar Falls, Iowa.

Project Team Member Resumes

Mark C. White, Ph.D., Project Director

Dr. Mark White is training and technical assistance director at the Center for Regional Economic Competitiveness (CREC) and its sister affiliate, the Council for Community and Economic Research (C2ER). He joined CREC in September 2004 to manage a number of research and technical assistance projects.

Most recently, Dr. White has been supporting planning efforts associated with Regional Innovation Grants in Iowa's Cedar Valley and an 11-county, 3-state region around Sioux City, Iowa. He is also continuing to support the Georgia Governor's Office of Workforce Development's Workready Region Initiative by providing technical assistance related to economic data and strategic planning. Dr. White is also assisting the Sarnia-Lambton Workforce Development Board to create a workforce development plan for Sarnia-Lambton County in Ontario.

He has also worked on a variety of other projects including a workforce supply and demand study for the North Carolina Workforce Commission and helped facilitating discussions that were intended to lead to policy recommendations addressing the issues raised in that report. He also worked with Arizona's Data Estimates and Projections Taskforce (ADEPT) to support their

efforts to improve the state's employment and population data. Another recent project involved examining how successful life sciences regions have organized their life sciences development efforts. The goal of the project was to provide a framework for leaders to consider opportunities for expanding the Detroit regional life sciences sector.

Other past projects include a Comprehensive Economic Development Strategy (CEDS) for the Isothermal Planning and Development Commission in Western North Carolina, a Visioning Plan for North Carolina's Eastern Region Partnership, as well as assisting in the implementation of a CEDS focused around Hickory, North Carolina. In addition, he recently completed a comprehensive workforce analysis for the Durham (NC) Workforce Development Board and an assessment of the skills and training needs of the construction trades industry for the Arizona Department of Commerce. Among his current ongoing projects include an assessment of the skills and training needs of the Arizona Solar Power Industry, and a nationwide survey designed to assess the role of Community Colleges in Economic Development. He also coordinates C2ER's research and training programs, including the creation of a national database of local taxes affecting businesses.

Prior to joining the Center, Dr. White served as a post-doctoral research fellow at the National University of Ireland's Centre for Innovation and Structural Change (CISC) in Galway. In that position, he conducted qualitative and quantitative research to assess the regional development consequences of foreign direct investment, particularly as related to investment in internationally-traded services. This research has been published in peer-reviewed journals in the field of regional development and economic geography such as *Environment and Planning A*, *European Urban and Regional Studies* and *European Planning Studies*.

In the process of completing his doctoral work, Dr. White served as an instructor in World Geography and a GIS/Cartographer at the University of Miami (FL). He also served as a business research intern for the Beacon Council—Miami-Dade County's primary economic development organization. Dr. White earned his Ph.D. in International Studies with a focus on economic development from the University of Miami (FL), his M.A. in Geography from the Maxwell School Of Citizenship and Public Affairs, Syracuse University, and his B.A. in Geography at the State University of New York at Plattsburgh.

Kenneth Poole, Ph.D., Project Principal and Project Co-Director

Dr. Kenneth E. Poole is CEO of the Center for Regional Economic Competitiveness (CREC) and Executive Director, Council for Community and Economic Research (C2ER). Dr. Poole has managed economic development research, analysis, and technical assistance efforts for 27 years. In January 2000, Dr. Poole formed the Center as an independent non-profit affiliated with C2ER and the Labor Market Information Training Institute. CREC focuses on developing a stronger understanding of how regional economies can compete effectively in the knowledge-based economy. As part of those efforts, Dr. Poole directs C2ER, a national nonprofit membership organization, serving economic and community development researchers in communities, states, academia, and the private sector. A key part of C2ER's programs is the LMI Training Institute, a training program designed to help data users and producers gain skills in using workforce information to drive regional workforce and economic development policy making. In his capacity of Executive Director, Dr. Poole oversees all program development activities of both organizations including the research, consulting, and professional training activities.

As CEO of the Center for Regional Economic Competitiveness, Dr. Poole undertakes project activities that involve organizational development, strategic planning, network building, and technical assistance efforts to foster knowledge-based economic development. Dr. Poole has led or serve as a lead consultant in five Regional Innovation Grant projects in the Future Forward area (three workforce boards in western North Carolina), Texoma (Texas-Oklahoma border region), Siouxland (tri-state region near Sioux City, IA), the Upper Rio Grande (greater El Paso), and Cedar Valley (eastern Iowa). Other recent projects involved managing multi-county regional analysis and strategy implementation efforts in eastern North Carolina, southwestern Virginia, southern Arizona, southern Georgia, and southwestern Ontario. Dr. Poole has also facilitated numerous retreats and working sessions, including recent planning retreat designed to link the US Department of Labor's Workforce Innovations for Regional Economic Development (WIRED) effort with the activities of the US Manufacturing Extension Partnership (MEP). For the past five years, Dr. Poole has worked with the State Science and Technology Institute (SSTI) to develop a stronger relationship between federal and state investors in the NIST MEP program.

Dr. Poole speaks frequently to national and statewide audiences of local leaders and economic development professionals. He worked with the National Center on Education and the Economy and the National Association of Workforce Boards (NAWB) to develop a training program focused on bringing economic and workforce development and economic development policy leaders together, presenting the course in several venues nationally. That training program became the foundation for the curriculum that he co-developed for planners involved in conducting Comprehensive Economic Development Strategies (CEDs) for the US Economic Development Administration.

Before joining the Council for Community and Economic Research (formerly ACCRA) in 2000, he served 6 years as the Director of Domestic Economic Development for the National Association of State Development Agencies. In that capacity, he provided technical assistance and research support to state and local economic development professionals across the US. He developed new project opportunities in technology-based economic development, economic and policy research, and the organization of state-based economic development initiatives. For instance, one project involved an assessment of program evaluation activities being implemented by state economic development initiatives for the US Economic Development Administration. Another involved assessing and designing a new applied industry research program for manufacturing in Alabama. Before joining NASDA, Dr. Poole served 8 years as Director of Technical Assistance and Research for the National Council for Urban Economic Development (now, the International Economic Development Council) where he managed all publications and technical assistance activities in more than 40 US communities.

On behalf of C2ER, Dr. Poole oversees an on-going national data collection effort (including the development of a comprehensive web-based database of 1,800 state business assistance programs), the Council-published *ACCRA Cost of Living Index* and training programs for economic development practitioners, including a national training institute conducted in collaboration with George Mason University and several other institutions. Dr. Poole also teaches and coordinates training offerings related to impact analysis, research design methods, cluster analysis, benchmarking, targeting, and other regional economic analyses targeted to economic developers.

Dr. Poole holds a Ph.D. in Regional Development Policy from George Mason University, a Masters in Public Administration (MPA) from The American University, and a B.A. in Political Science and Psychology from the University of North Carolina at Chapel Hill. He serves on the

editorial boards of two journals: *Economic Development Quarterly* and *Applied Research in Economic Development*. He also serves on the Advisory Board of the Troy University Center for International Business and Economic Development.

Drew Conrad, Program Facilitator

Drew Conrad, CEcD, IDM Sr. Program Manager, has over 15 years of experience in facilitating strategic planning and regional economic research in communities and local and regional economic development organizations. He designs, delivers and provides follow-up support for economic development services including strategic and short-term planning, conducting community assessments, cluster analysis and target industry analysis and conducting other applied research projects. Applied research projects he has undertaken include the development of the laborshed methodology now used by Iowa Workforce Development (IWD). Over the past 10 years he has worked closely with IWD to enhance Iowa's laborshed analysis process, develop the its skill shed methodology, and is currently working with them on the implementation of a DOL funded LMI green jobs project and a layoff aversion demonstration grant. He also developed the handbook *Examining Strategies for Cluster-Based Economic Development in Rural Iowa* for the Community Vitality Center and *A Decision Making Model for Forming a Regional Economic Development Effort* and *Understanding and Identifying Industry Clusters and Cluster-Based Economic Development Strategies as Part of Regional Economic Development Efforts* for the Economic Development Administration.

Mr. Conrad has presented at numerous economic and community development conferences, workshops and seminars. He previously served as Marketing Manager for the Industrial Site Location Program (ISLP), where he provided technical assistance to communities and was responsible for marketing and providing information about the ISLP to business clients, community groups, economic development groups, and local, state and federal government officials. Mr. Conrad is a Certified Economic Developer (CEcD) and holds a BA in American History/Pre-Law and a Masters in Public Policy (MPP). He was the President of Professional Developers of Iowa in 2005.

Ronald Kelly, Program Analyst

Ronald Kelly serves as a program analyst for the Center for Regional Economic Competitiveness (CREC) and the Council for Community and Economic Research (C2ER). His duties include working with senior staff to develop and implement training programs for C2ER on the use and analysis of socioeconomic data, preparing and analyzing socioeconomic data, presentations, and reports for clients, as well as coordinating C2ER organizational advocacy efforts on behalf of regional economic development efforts.

Prior to joining CREC and C2ER, Mr. Kelly served as a Teaching and Research Specialist in the Department of City and Regional Planning at Cornell University. He also has significant experience in community development finance: serving as a consultant to community development financial institutions seeking federal grant funding, as a community member involved in the founding of a low-income designated credit union in Upstate New York, as a Supervisory Committee member of Alternatives FCU, and as a Financial Analyst for ShoreBank where he served primarily as Fund Advisor to National Community Investment Fund.

Mr. Kelly holds an MRP in City and Regional Planning with a concentration in Economic Development from Cornell University and a Bachelor of Science degree in Business Management from Rochester Institute of Technology.

Erol Yildirim, Chief Economist and Web Programmer

Erol Yildirim is director of data products for the Center for Regional Economic Competitiveness and its sister nonprofit, the Council for Community and Economic Research (C2ER) – formerly known as ACCRA – a membership organization of economic development researchers. He serves as the organization’s chief economist and also oversees the Center’s web development efforts. Before taking over his current role, Mr. Yildirim managed the ACCRA Cost of Living Index project for five years.

Mr. Yildirim has primary responsibility for managing new product development and dissemination activities for C2ER, enhancing the organization’s existing data products, managing customer relations with data subscribers and licensees, responding to media inquiries, and staffing C2ER’s technical advisory board of eminent academic and government economists.

Mr. Yildirim also designs online surveys customized to individual clients’ needs, analyzing the results in a statistical summary. Among his recent accomplishments include the creation of the Historical ACCRA Cost of Living index, the redesign of the ACCRA Cost of Living Index, C2ER, and CREC websites and the creation of the ACCRA Cost of Living Index Web Calculator. Mr. Yildirim also designed and implemented the ACCRA Cost of Living Index Price Collector software - a web based application that allows the data collectors to enter and submit their local data over the web and C2ER staff to review over 100,000 data points in a timely manner. He also developed e-commerce sites for both C2ER and COLI, and created a national searchable database structure for the C2ER State Incentives Database. In addition, Mr. Yildirim participates in other CREC and C2ER consulting assignments and supports the C2ER training and educational program.

Before joining C2ER in 2002, Erol Yildirim worked as a Business Manager at Mason Enterprise Center, Mentor Protégé Program. He supported a Department of Defense program and served as a vehicle and catalyst for building long term business relationships between major US Department of Defense contractors and small disadvantaged businesses.

Erol Yildirim holds a M.A. in Economics from George Mason University. His specialties are Public Finance and Monetary Economics. He also holds a M.A. from Fairleigh Dickinson University in Financial Economics. Erol Yildirim has practical and educational experience in information systems and web development. His programming skills include Visual Basic, Oracle PL/SQL, SPSS, and ASP. He has completed extensive class work toward a doctorate in economics. He serves on the National Advisory Board of National Elder Economic Security Initiative and advises the Bureau of Labor Statistics International Committee. Mr. Yildirim is also fluent in Turkish.

Wen Sun, Research Analyst

Wen Sun serves as research analyst for the Center for Regional Economic Competitiveness (CREC) and its sister affiliate, the Council for Community and Economic Research (C2ER). Her duties include providing research and project assistance for a variety of programs, including data analysis and review for C2ER’s *ACCRA Cost of Living Index* publication. She conducts data

reviews, coordinates participant participation, and calculating indices. She also assists in managing and updating website content.

In recent assignments, she has gathered and organized industry and occupational employment data for a number of regions, including an 11-region project in Georgia. She also conducted data analysis of women-owned enterprises and entrepreneurship using the Census Bureau's DataFerrett database tool. Ms. Sun also provides support for both the CREC and C2ER websites, including both content management and web programming. In addition, she provides research support and writes for the monthly C2ER newsletter. Prior to joining CREC and C2ER, she was a research assistant for the Department of Economic and Workforce Development at the University of Southern Mississippi.

Ms. Sun received a M.S. in Economic Development from the University of Southern Mississippi and Bachelors of Science degree, majoring in Real Estate Economics at Sichuan Normal University in Chengdu, China. She is fluent in Mandarin.

II. WORK PLAN AND SCHEDULE

Following is the work plan as described in the RFQ as well as additional detail on how our team would approach addressing different elements of the plan. The goal of the effort would be to identify the capabilities of workers within the region's skill shed and develop appropriate initiatives targeted in such a way that it is closely tied to regional economic development efforts. We would seek to accomplish these goals with core leadership team buy-in and with help garnered from increased stakeholder involvement. A key anticipated outcome is identifying potential resources to help ensure the sustainability of the implementation plan.

Task 1: Project Organization

The purpose of this task is to ensure that a strong project management system is put into place and that the Advantage Valley core leadership team has support from local and regional leaders in the strategy development and implementation process.

Task 1.1: Participate in an on-site entrance conference involving interviews of management and other significant staff

Within three to four weeks after a contract is awarded, the CREC project consulting team will organize and conduct a series of on-site meetings with the Advantage Valley core leadership team and other key players. In these meetings, the team would review the scope of work with the Advantage Valley core leadership team, serving as a project steering committee and discuss refinements to reflect concerns or key project goals that may need additional attention. The leadership team and the project consulting team will also use this initial meeting to identify key research issues and identify relevant information that will be required. An anticipated outcome of the meeting will be a refined research design process. In addition, this site visit will provide an opportunity to discuss how best to engage other stakeholders in the planning and implementation process and undertake preliminary discussions with some key stakeholders who may not currently participate as part of the core leadership team.

One important way to engage stakeholders that are not currently participating as part of the Advantage Valley core leadership team is through the formation of a Strategic Plan Advisory Committee. The core leadership team would invite regional leaders to participate in periodic Advisory Committee discussions to provide their insights and input into the planning process as well as engage those members to become directly involved in supporting the plan and its implementation. Members of this group might include business leaders, workforce or economic development board leaders, key elected officials, college or university CEOs, or other high profile individuals who could help to build credibility and visibility for the plan but who might not be actively involved in day-to-day implementation efforts. Quite often such individuals volunteer to help but may have very limited time that they can devote to this type of effort. The practitioners involved as members of the Advantage Valley core leadership team will need the help of these volunteer advisors in building overall support for the implementation plan and accessing much needed resources. Working with the consulting team, the core

leadership team will identify potential Advisory Committee members and help organize this group in a way that ensures it represents a wide of array of regional leaders representing the private sector, economic development, business groups, citizen and/or civic interest groups, higher education, K-12 education, and others.

Since the key purpose for the Strategic Plan Advisory Committee is to provide insights and help in creating credibility for the strategic choices being made, it will be important to plot out how best to use the time of that group. During the “initial project visit,” the consulting team suggests convening one or more regional stakeholder “kick-off meetings” in which formally recognized leaders (e.g., elected officials or key appointed officials) as well as “informal” leaders (e.g., key private or public sector leaders who may not be part of the Strategic Plan Committee) are engaged in the project. This might be done as a single meeting, a series of meetings around the region, or a combination of group and one-on-one discussions.

One typical way to approach this engagement is the facilitation of a regional workforce leadership “summit.” During the summit, these key leaders would review the proposed scope and plans for the strategic implementation planning process and be offered an opportunity to volunteer to become engaged in the broader planning effort. The rationale for a summit would be to engage participants and build energy around the planning process as it begins. Additionally, it may be important to conduct supplemental one-on-one or small group interviews with key local leaders who may not be available to participate in the summit or whose views are so critical to success that the consultants should meet with them individually. These discussions could also be organized during the initial site visit.

Task 1.2: Manage on-going communications for the project

Developing a Strategic Implementation Plan will require on-going involvement of the Advantage Valley core leadership team throughout the process. We propose periodic conference calls (as frequently as monthly once the project gets underway) between the Steering Committee leaders and the consulting team to discuss the project, track progress to date, identify significant accomplishments, and review next steps or project adjustments. These discussions would supplement planned Strategic Plan Committee meetings, project staff meetings, or other stakeholder meetings as appropriate.

We also propose to work with the Advantage Valley core leadership team to develop a website that will serve as a source for information about the project and that helps to engage local businesspersons, elected officials, and other stakeholders seeking to track the progress of the research and planning process and provide their input. The website would be updated throughout the project, particularly in anticipation of Advantage Valley core leadership team or other stakeholder meetings. Whenever new material is added, the Advantage Valley core leadership team would distribute email communications to stakeholders to provide an update and offer an opportunity for input. It is important that these communications come from the team (rather than the consultant) so it is important that the core leadership team designate a local project manager to work with the consultants in managing these on-going communication tasks.

TASK MILESTONES AND DELIVERABLES:

- Initial kick-off meeting (September)
- Refined research design and scope of work for the project (October)
- Monthly leadership team conference calls/progress reports
- Quarterly core leadership team meetings
(piggy-backed with other project activities as appropriate)

Start date: September 1, 2010

Completion date: June 30, 2010

Task 2: Industry Cluster and Skills Shed Analysis

In this task, the project team would identify industry clusters, analyze census data in define labor sheds and commuting patterns, and conduct related research and analysis to inform the decision making process and discussion sessions. The purpose of this task is to assess the capabilities of the region's workforce supply to meet the needs of a targeted group of industries. Ultimately, the goal is to better understand the gaps between the skills that current and potential area businesses seek in future new hires and the skills available in the region's workforce.

Task 2.1: Review existing research, reports and plans

Key issues regarding the research must be addressed including the collection of background research and selection of appropriate secondary data sources. The team would obtain and review key research, studies, and supporting materials, including:

- ETA-developed materials for WIRED (e.g., the series of monographs developed by the Council on Competitiveness)
- Resources on the DOL Workforce3one website, including DOL webinars on planning and program implementation
- Labor Shed Study completed by the WV Development Office
- Labor Market Information available from the state labor offices in West Virginia, Kentucky, and Ohio
- Targeted industry information provided by state and local economic and/or workforce development organizations in West Virginia, Kentucky, and Ohio

In addition, we anticipate that the Advantage Valley core leadership team and the consulting team will identify other studies during the initial discovery phase of the project – including analyses of area public schools or colleges and universities as well as other studies of the state or regional economy that have been guided local policy makers and practitioners in their economic development, workforce development, and education initiatives (such as recent recruiting back-office insurance operations). These research findings and related data will be synthesized and used in the analysis.

In reviewing prior research, the team expects to learn that these reports vary widely in the questions they address, the time frames they use, the geographies they cover, or

the methodologies employed. The consulting team will then determine the gaps in available information. Based on that assessment, the consulting team will collaborate with the Advantage Valley core leadership team in the final design of any additional quantitative and qualitative analyses designed to supplement existing research.

Task 2.2: Conduct a quantitative analysis to supplement information about previously identified industry clusters and occupational targets

Recognizing that planning for tomorrow requires targeting available resources, the consulting team will analyze the existing data about the region's economy to determine which areas should be the focus of workforce system investment. The project team will conduct a trend analysis for current industries and occupations in the region designed to provide a foundation for our understanding about the targeted industries and the key occupations available to workers in those industries. That analysis will also include an assessment of potential growth patterns in those industries, given current economic forecasts.

Key criteria to be used in assessing total projected growth in targeted industry clusters and occupations as well as relative wages for those jobs. The consulting team will use existing industry forecasts to identify anticipated changes in employment and wages using 5-digit North American Industrial Classification System (NAICS) industry data and 6-digit Standard Occupational Classification (SOC) occupation data. Once this information has been developed and analyzed, the team will examine how recent trends and anticipated forecasts are likely to affect employment in targeted industry clusters as well as identify the extent that emerging industry clusters that might offer opportunities in the near future. Using forecasts of employment and wages, the team will identify key industry clusters and their likely occupational demand for clusters the team believes merits the attention of the core leadership team and other regional leaders.

To provide additional information in this time of extreme uncertainty (especially regarding economic forecasts), the project team plans to access current "real-time" employment data to guide the forecasting process and to provide greater insights into the likely patterns of employment. This "real-time" data is generated by proprietary vendors who use computer "spidering" technologies to scour the internet for job advertisements on job boards and corporate websites. The resulting data can provide insights into which companies and which occupations are currently hiring. Reviewing that data during the past several months through the end of 2010 could provide insights on identifying the "turning point" for hiring as well as information regarding the availability of vacancies in key occupations.

Task 2.3: Generate a labor market supply analysis, emphasizing workers available for the targeted industries and occupations

To supplement the workforce demand data being generated in the previous task, the consulting team will generate information about the current and forecasted workforce supply in key groups. These data are expected to be derived from the demographers' offices of the respective states or from proprietary data sources. This analysis would include details on the Advantage Valley's changing age structure and ethnic mix,

especially working age adults, in-migrants, soon-to-retire workers, and young new-to-work adults. In addition, the team will examine data from the Census Bureau's Local Employment Dynamics program to gain an understanding of key demographic characteristics of the overall workforce and for key targeted industries. This data on workforce supply will be mapped to the current and forecasted industry cluster mix as a starting point for identifying key education and training needs.

Task 2.4: Conduct a skills analysis for in-demand occupations in the target industry clusters

After completing the analysis of key occupations, the project team will then examine the skill needs within those occupations and compare that with the skills of recently dislocated workers. The data from dislocated workers would come from enrolled participants as well as data on "job destruction" from the Local Employment Dynamics program. Using O*Net, we will identify the typical skills required for the jobs being lost and those being added to identify any areas in which relatively easy transitions might be made. O*Net uses a job zone system where occupations are given a level rating from 1-5 determined by the amount of training and education needed. This will allow us to create a directory of occupations within the targeted industries that might map well with those of dislocating workers and a list of key occupations that will require workers to be identified from other sources.

Task 2.5: Prepare an analysis of the region's skills shed and training gaps for selected target industry clusters

The final step in our research will be to bridge the gap between the skill sets of today and the industry needs of tomorrow. Through O*NET, we will be able to quantify the importance and level of skill and knowledge prevalent in our supply of workers and that which we need to meet the demand of next-generation employers. By analyzing the difference between current skills and knowledge and those needed we will be able to see which knowledge-based industries would be most suited to a particular region's workforce. In the next task, this information will be integrated into our assessment of key education and training assets. In addition, as appropriate, the analysis will also include visual depictions of key social network elements and mapping of detailed geographies of concentrations in specialized knowledge skills abilities, and other competency worker characteristics.

TASK MILESTONES AND DELIVERABLES

- Delivering a written summary of key findings (December 2010)
- Oral presentation of the findings to the project partnership and other stakeholders (December on-site session)
- Guidance in reviewing software needs including mapping, benchmarking, indexing, demographic, and labor market analysis tools

Start date: October 1, 2010

Completion date: December 31, 2010

Task 3: Identifying regional assets

The purpose of this task is to document the assets available for regional workforce and economic development purposes so that there is a common understanding of what is available and how these assets might be deployed to promote innovation and economic growth. An asset map represents an inventory of key resources that represent the foundation on which regional economic and workforce development can occur. This map provides information about the capacity to respond. Using the Council on Competitiveness report, “Illuminate,” as a guide, the asset mapping process involves three levels of asset analysis – identification, evaluation, and assessment. For the purposes of this project, the consulting team will focus on identifying education and training assets as well as key innovation assets that might result in unanticipated job creation from emerging businesses, newly attracted companies, or more rapid-than-expected growth in existing firms.

Task 3.1: Identify an inventory of key assets

The asset mapping process will begin with an inventory of key regional resources (people, economic, institutional, physical, and other assets) and help to identify hidden or underutilized assets which may be utilized in the implementation of the regional workforce plan. The asset mapping will focus on key higher education and training assets. Consequently, assets such as K-12 and higher education institutions, private training providers, and research and development institutions will be included. In addition, the team will also examine “innovation assets” that might be particularly important for emerging or growing industries in the Advantage Valley.

In particular, the consulting team will work with stakeholders to identify the region’s most important education, training, and research-related assets that are particularly relevant to targeted industries. In this process, the consulting team will organize information about key identify points of contact to ensure that we are able later in the project to obtain the data on the capacity of these institutions to meet the region’s workforce demand.

Task 3.2 Evaluate key assets

The asset mapping process will also include an evaluation of the resources identified to determine the current level of utilization and potential future utilization of the resources by various audiences (employers, existing workforce, potential workforce, future workforce, etc.). The CREC team will work with Advantage Valley to analyze and document the asset mapping results so they can serve as a resource during the development of the regional workforce plan.

Task 3.3: Assess the value of key assets

Once information on assets is developed and an evaluation of key gaps in the region’s assets are more fully understood, the next phase of the asset mapping process involves discussions with the Advantage Valley core leadership team and other stakeholders about the importance of those assets to the regional strategy as well as the inter-

relationship among those assets. This assessment will be conducted through the consulting team's on-going communications with the Advantage Valley core leadership team as well as interviews and strategic dialogue with regional decision makers.

A key emphasis during this asset mapping exercise will be on programs designed to promote education and training in Science, Technology, Engineering, and Math (STEM). The asset map will feature a specific section targeted to assessing those initiatives and programs. Another feature of the asset analysis will be the identification of agencies receiving workforce development funding and their areas of focus.

TASK MILESTONES AND DELIVERABLES

- Resource/Asset Map analysis draft incorporating information about (December 2010):
 - Training needs for targeted industry clusters and economic drivers
 - Education and training programs to support entrance into STEM professions
 - Organizations receiving workforce funding
 - A map of key skill/talent sheds
 - Identification of key gaps in the social network that need to be addressed through recruitment of additional participants in the Strategic Plan Advisory Committee
- PowerPoint presentation to Advantage Valley core leadership team (December 2010 on-site visit)

Start date: October 1, 2010

Completion date: December 31, 2010

Task 4: Workforce Development SWOT/GAP Analysis

The purpose of this task is to integrate the findings from prior tasks with other research to determine which assets should serve as the foundation for selecting strategies to strengthen the region's workforce advantage. This task marks the beginning of an external engagement effort aimed at energizing interest in the planning process, building on the information and research conducted during the first three months of the project.

Task 4.1: Analyze the trends, challenges, and themes facing the region's existing workforce

The consulting team will organize the findings from the prior tasks into a summary PowerPoint presentation, with key tables, graphs, and other visuals representations along what it feels are the most important analytic themes in such a way as to tell a story about the Advantage Valley region. This integrated presentation material is designed to help regional leaders better organize their input thus far on key challenges - in the form of regional weaknesses or threats – as well as assets – in the form of regional strengths and opportunities.

Task 4.2: Validate findings through interviews with local business and other target industry cluster leaders

This initial synthesis of findings is based on the CREC consulting team's perceptions of the data gathered to date. It is important to compare this to the perspectives of key stakeholders and representative companies. The project team would conduct a series of interviews with these stakeholders, especially companies in targeted industries. These interviews—to be organized by the Advantage Valley core leadership team in collaboration with local partners—are intended to validate and provide greater insight into the trends identified in the previous tasks. Whereas the data show the patterns of general skill needs, this task would offer the opportunity to better explore the processes driving these patterns.

To complete this task, we request local assistance from staff to help identify and contact potential business interviewees, complete advanced scheduling, and make logistical arrangements for the interviews. It is important to note that this task may require significant administrative staff resources from a local partner (and the Advantage Valley core leadership team should plan accordingly). Frequently, local staff will be more successful in scheduling the interviews because there may already have contacts or relationships with potential interviewees. Furthermore, if desired, Advantage Valley core leadership team staff might wish to accompany the consultant to some of the interviews to gain their own sense of area business perceptions.

The team anticipates interviewing at least 20 to 30 employers, with an emphasis on those in identified targeted clusters. These meetings could be accomplished in small focus groups of 5-7 employers or in one-on-one interviews. One-on-one meetings provide much more detail and are ordinarily scheduled for one hour. A single consultant can conduct approximately 5 one-hour individual interviews in a single day (assuming that the interviews are all scheduled for the same location), providing 30 minutes between each interview to allow for appropriate breaks (including lunch), late meeting starts, or interviews that may go beyond their scheduled time. If the interviewer must move from location to location, fewer one-on-one interviews may be possible in a single day, depending on the drive distance between each interview site. However, this may be essential to obtain insights from certain key companies.

Another approach would increase the number of company interviews to the likely detriment of getting fewer company CEOs to participate. This approach uses focus groups of 5 to 7 companies per meeting. Typically, the human resources executive or some other official will participate instead of the CEO, but these can be valuable ways to engage dialogue among similar companies. Typically, two consultants could conduct about three to four 90-minute focus groups in a day (one leading the interview while the other takes detailed notes). The consulting team will work with the staff to determine the most appropriate way to conduct these business interviews.

Simultaneously, a set of interviews would also be conducted with key public education and post-secondary (P20) education and training leaders who have implemented or have plans to implement a training response for the targeted industries. The goal of this set of interviews – conducted separately from the business interviews—would be to better understand how the “systems” plan to respond to the needs of the key clusters.

Task 4.3: Conduct a working session #1 with the Strategic Plan Advisory Committee to review findings and complete SWOT/gap analysis

The specific design of the decision making process will be based upon input from the Advantage Valley core leadership team, CREC's previous experience working with communities and regions, and our analysis of previous studies and research. This process is designed to build a regional consensus on the most important strategic goals and objectives that will be developed will serve as the core foundation of the Advantage Valley Strategic Implementation Plan.

The CREC consulting team proposes to begin the process by providing a briefing for Strategic Plan Committee on how the quantitative and qualitative analysis developed earlier should inform policy making. This briefing will review the findings and provide an opportunity for the Committee to discuss possible interpretations from the analyses completed in earlier tasks. Immediately following this initial briefing, the CREC consulting team will guide Strategic Plan Committee members through a retreat-style dialogue to examine key issues and reach consensus on the most important growth and workforce issues facing the region. This dialogue will provide an opportunity for Strategic Plan Committee members to voice their opinions and create consensus around the most important needs and challenges that should be addressed in the strategic plan.

Task 4.4: Identify the most strategically significant issues to be addressed in the workforce development plan

The CREC consulting team will integrate the interview results with feedback from the core leadership team into a summary of the SWOT/Gap Analysis. This analysis will be developed into an interim deliverable called the Strategic Opportunities and Challenges Briefing Paper. The Briefing Paper will represent the consultant's summary of the issues raised during the project and will serve as a point of departure for Advantage Valley Strategic Planning Advisory Committee discussions about the strategic implementation plan. The goal is to focus the Advantage Valley Strategic Planning Advisory Committee on making choices as to which issues and opportunities are the most critical for the region to address and to facilitate consensus in a way that avoids unnecessarily lengthy or complex discussions.

TASK MILESTONES AND DELIVERABLES:

- Business and other stakeholder interviews (November and December 2010)
- Written SWOT/GAP Analysis briefing (January 2011)
 - Incorporating a specific focus on gaps related to key industry clusters
 - Suggesting how best to integrate "real time" information about job availability, especially in targeted industries, in determining which education and workforce training programs to offer
 - Recommending an appropriate STEM education and training referral process for dislocated workers and students
- Oral presentation of findings to the core leadership team (January 2011)

- Disseminate to the Strategic Plan Advisory Committee (late January 2011)

Start date: October 15, 2010

Completion date: January 31, 2011

Task 5: Innovation Identification and Strategy Development

The purpose of this task is to guide the Strategic Plan Advisory Committee in developing appropriate goals and objectives that can be used in guiding post-planning project activities.

Task 5.1: Conduct Working Session #2 as a briefing for the Strategic Plan Advisory Committee

The consulting team will share the Strategic Opportunities and Challenges Briefing Paper with the Strategic Plan Committee members as background for a discussion about key action opportunities. That presentation will be followed by a decision-making session aimed at framing the workforce development plan with the Strategic Plan Committee. At this point, the Committee will establish a consensus on major strategic goals and brainstorm ideas for actions. This session is anticipated to be a half-to-full day (minimum of four-hour) meeting with Strategic Plan Committee members.

Task 5.2: Identify candidate actions

Based on the work done in the prior Strategic Plan Committee decision-making sessions and the lessons learned from the best practices, the consulting team will develop a candidate list of actions necessary for the region to begin achieving their vision and addressing the priority issues. The candidate list of actions will be tied to the organizational mission, the economic development plan vision and goals, as well as to the Advantage Valley region's values. These proposals will serve as a starting point for the Strategic Plan Committee in the next step of their discussion in which they determine appropriate, realistic, yet innovative regional strategies for workforce development in the Advantage Valley Region.

Task 5.3: Conduct working session #3 with the Strategic Plan Advisory Committee to select priority actions and a briefing for a joint meeting of the executive committees of the Kentucky, Ohio and West Virginia Workforce Investment Boards

The consulting team will present the draft candidate action items for discussion at a Strategic Plan Committee half-day working session. The Committee will be asked to select a maximum of six to ten actions that will become their "highest priorities." The focus of the discussion will be on reviewing and discussing the ideas generated in greater detail to determine which are feasible and how they might align with the strategic priorities they identified earlier. In deciding which actions should be included during this discussion, the Committee will assess the proposed actions' importance and feasibility.

During the discussion, the Committee will identify potential partners and/or stakeholders important for implementing each of the actions. Many of those partners and stakeholders would have been active participants in the Strategic Plan Committee discussions. For those that may not be active, the Advantage Valley core leadership team will work with the consulting team to determine how best to engage those stakeholders to ensure their buy-in and willingness to commit to helping with implementation. At the session's end, the consulting team will assist the Strategic Plan Committee and the Advantage Valley core leadership team in developing a preliminary list of action items and partners with whom the Advantage Valley core leadership team should collaborate in moving the action forward.

After the session, a planned debriefing and discussion session with the Advantage Valley core leadership team would be scheduled in order to review the results to date and gain input and insights about key plan elements that should be documented from the session. From that input, the consulting team will revise the preliminary "strawman" plan into a draft action plan for further discussion by the core leadership team and the Strategic Plan Advisory Committee.

In addition, the team would participate in a joint meeting of the executive committees of the Kentucky, Ohio and West Virginia Workforce Investment Boards. The purpose of that meeting would be to brief the leadership of the boards and generate statewide support for collaborative implementation efforts.

TASK MILESTONES AND DELIVERABLES:

- Summary of Strategic Goals and Candidate Actions (February 2011)
- Identification of Priority Actions (March 2011)

Start date: January 15, 2011

Completion date: March 31, 2011

Task 6: Strategic Plan Preparation and Adoption

The purpose of this task is to complete the preparation of the Advantage Valley Regional Innovation workforce development strategy and initiate implementation planning.

Task 6.1: Prepare outlines of priority action plans

Based on the results of the Advantage Valley Strategic Plan Advisory Committee's proposed actions identification session and our prior work, the project consultants will prepare a "strawman" draft of the plan for discussion. The action plan will include each of the proposed actions, a summary of the rationale for its selection, and suggestions for possible implementing organizations. This document will serve as a framework for engaging potential implementation leaders for each strategy and the basis for later Strategic Plan Advisory Committee deliberations in developing a more detailed implementation strategy for each of the actions selected. As additional work continues beyond the plan development phase, the Advantage Valley core leadership team will identify "low hanging fruit" that helps gain early momentum for the implementation plan moving forward.

For each priority action, the consulting team will assist the Advantage Valley core leadership team in developing initial implementation plan outlines. The outlines would identify the action, key tasks, key partners, key outcome metrics and activity milestones, and funding considerations.

Task 6.2: Conduct Working Session #4 with the Strategic Plan Advisory Committee to finalize the strategic implementation plan and stimulate action

The consulting team will refine the workforce development plan, making appropriate edits from inputs that occur during the “adoption & endorsement” process. The refinements will be made to the “general public” version as well as the “official” version of the final document. Collateral materials developed during earlier phases of the project (and continuously posted throughout the process on the project web site) will be gathered and incorporated as appendices as appropriate. The final documents will be prepared for final “formal” approval at a final meeting of the Strategic Plan Action Committee and other relevant board meetings. The consulting team will assist the Advantage Valley core leadership team leadership team in determining how best to “publish” the final document, including providing support to the client in their work with a professional graphics and design firm to prepare printed versions to be shared with the broader public.

TASK MILESTONES AND DELIVERABLES

- Advantage Valley Strategic Implementation Plan (June 30, 2011)
 - Implementation templates for critical strategies, with key goals, metrics, tasks as well as funding and other resource requirements as elements of the Regional Strategic Implementation Plan
 - One to two page executive summary of conclusions written in plain English with index references to the body of the report
 - Physical and an electronic copy of work papers, tables and models in Microsoft Word and Excel 2007 format
- Oral presentation of final strategy (preferably by leadership team rather than by consultant to demonstrate “buy-in”) (June 30, 2011)
- Guidance in the development of marketing and promotional awareness items (May through July 2011)
- Exit conference with management and significant staff as designated by the Commissioner of WorkForce West Virginia (June 30, 2011)
- Presentation materials (in Power Point 2007 format) customized for future delivery by regional leaders (July 31, 2011)
- Production of final report with 30 bound original copies and an electronic Microsoft Word 2007 copy of the final report and electronic Microsoft Excel 2007 copy of all tables and charts (July 31, 2011)

Start date – April 1, 2011

Completion date – July 31, 2011

III. PROPOSED PROJECT BUDGET

This section includes the cost proposal/bid sheet for comparison purposes as well as the specific budget requirements for the scope as define in the above section.

Cost Bid Sheet for Scope of Work Described in RFQ

In the request for quotations, WFWV provides a detailed bid sheet to be used in comparing costs. Following is the estimated labor costs associated with the estimated time in that bid sheet. The sheet assumes that a project director and co-director (both senior project management consultants with PhDs in related fields of study) will be responsible for the work completed. In addition, all personnel used will include staff with strategic planning for workforce/economic development and a master’s degree in a related field. Hourly rates in this section represent a weighted average of those that would be charged by individual staff members. Later in the section, we provide a more detailed budget by task that incorporates suggested modifications of the scope of work as included in the RFQ as well as estimated costs associated with direct expenses such as project-related travel.

WORKFORCE WEST VIRGINIA

Cost Proposal/Bid Sheet for RFQ WWV-11-865

(Regional Innovation Grant Consultant)

Name of Proposing Firm or Vendor:	Center for Regional Economic Competitiveness		
Task	Number of Hours	Rate per hour	Total Proposed
Entrance Conference (3.4 a.)	40	\$ 240.08	\$ 9,603
Consulting Report including SIP and feasibility studies I (34b 1-8)	200	\$ 112.50	\$ 22,500
Physical and electronic copies of work papers (3.4 c.)	16	\$ 112.50	\$ 1,800
Three (3) on-site consultations (3.4 g.)	24	\$ 353.58	\$ 8,486
Power Point presentation of SIP (3.4.f)	40	\$ 125.00	\$ 5,000
Review or assist in marketing or promotional items (3.4.k)	40	\$ 150.00	\$ 6,000
Monthly status reports (3.4 i)	240	\$ 125.00	\$ 30,000
Analyze analysis software (3.4.1)	160	\$ 150.00	\$ 24,000
Exit Conference (3.4 h.)	40	\$ 217.58	\$ 8,703
Grand Total	800	\$ 145.12	\$ 116,092

*Number of hours provided above are for calculation and comparison purposes only and are not intended to reflect the number of hours projected to complete each task listed.

Note: The hourly rates listed are considered firm for the life of any purchase order that results from this RFQ. Ancillary expenses (travel, meals, lodging, etc.) are to be included in Total Proposed Cost and proposed hourly rates.

**Bid award will be based on the Grand Total of the Total Proposed Costs

RFQ WWV-II-B65

Proposed Costs for Recommended Scope of Work in this Response

While the Cost Proposal/Bid Sheet provides an example of what the costs would be should we follow the scope of work as outlined in the RFQ, our proposed scope of work differs somewhat from that RFQ. Subject to negotiation with the Advantage Valley team, we are recommending more on-site time (through business interviews to gain insights on actual training and employment needs) as well as additional data analysis support and strategy facilitation time than is envisioned in the RFQ.

As such, we are proposing work that we estimate will require 1,056 hours (an additional 256 consultant hours and one additional trip for business interviews above what the RFQ's Cost Proposal suggests). We make this proposal based on our experience in conducting five other Regional Innovation Grants and the level of effort required to achieve the goals as were laid out by the Advantage Valley Core Leadership Team. We suggest that accomplishing these goals will require an additional effort beyond what is specified in the Cost Proposal/Bid Sheet.

Following is a detailed budget that would allow CREC/IDM to implement the entire scope of work as defined earlier in this proposal. Our experience with other Regional Innovation Grants indicate that this proposed budget and level of effort is consistent with the budget for those other projects.

Advantage Valley Regional Innovation Grant Budget Estimate, 2010-2011

Phase	Task	Number of Hours	Rate Per Hour (Total Cost/Hours)	Labor Fees	Travel & Other Direct Costs	Total
1	<i>Project Organization</i>					
1.1	Participate in an on-site entrance conference involving interviews of management and other significant staff	40	\$240.08	\$6,900	\$2,703	\$9,603
1.2	Manage on-going communications for the project	96	\$146.88	\$14,100	\$0	\$14,100
	Sub-Total Task 1	136	\$174.29	\$21,000	\$2,703	\$23,703
2	<i>Industry Cluster and Skills Shed Analysis</i>					
2.1	Review existing research, reports and plans	28	\$107.14	\$3,000	\$0	\$3,000
2.2	Conduct a quantitative analysis of key industry clusters and occupational targets	56	\$178.57	\$6,000	\$0	\$10,000
2.3	Generate a labor market supply analysis, emphasizing workers available for the targeted industries and occupations	68	\$101.47	\$6,900	\$0	\$6,900
2.4	Conduct a skills analysis for in-demand occupations in the target industry clusters	88	\$132.95	\$11,700	\$0	\$11,700
2.5	Prepare an analysis of the region's skills shed and training gaps for selected target industries	112	\$128.57	\$14,400	\$0	\$14,400
	Sub-Total Task 2	200	\$230.00	\$42,000	\$0	\$46,000
3	<i>Identifying regional assets</i>					
3.1	Identify an inventory of key assets	52	\$100.96	\$5,250	\$0	\$5,250
3.2	Evaluate key assets	68	\$119.12	\$8,100	\$0	\$8,100
3.3	Assess the value of key assets	68	\$119.12	\$8,100	\$0	\$8,100
	Sub-Total Task 3	188	\$114.10	\$21,450	\$0	\$21,450

Phase	Task	Number of Hours	Rate Per Hour (Total Cost/Hours)	Labor Fees	Travel & Other Direct Costs	Total
4	<i>Workforce Development SWOT/Gap Analysis</i>					
4.1	Analyze the trends, challenges, and themes facing the region's existing workforce	32	\$112.50	\$3,600	\$0	\$3,600
4.2	Validate findings through interviews with local business and other target industry cluster leaders	64	\$172.59	\$7,200	\$3,846	\$11,046
4.3	Conduct a working session #1 with the Strategic Plan Advisory Committee to review findings and complete SWOT/gap analysis	52	\$167.35	\$6,900	\$1,802	\$8,702
4.4	Identify the most strategically significant issues to be addressed in the workforce development plan	68	\$119.12	\$8,100	\$0	\$8,100
	Sub-Total Task 4	216	\$145.59	\$25,800	\$5,648	\$31,448
5	<i>Innovation Identification and Strategy Development</i>					
5.1	Conduct Working Session #2 as a briefing for the Strategic Plan Advisory Committee	24	\$225.08	\$3,600	\$1,802	\$5,402
5.2	Identify candidate actions	52	\$132.69	\$6,900	\$0	\$6,900
5.3	Conduct working session #3 with the Strategic Plan Advisory Committee to select priority actions and a briefing for a joint meeting of the executive committees of the KY, OH and WV Workforce Investment Boards	28	\$252.29	\$4,500	\$2,564	\$7,064
	Sub-Total	104	\$186.21	\$15,000	\$4,366	\$19,366
6	<i>Strategic Plan Preparation and Adoption</i>					
6.1	Prepare outlines of priority action plans	28	\$139.29	\$3,900	\$0	\$3,900
6.2	Conduct Final Working Session (#4) with the Strategic Plan Advisory Committee to finalize the strategic implementation plan and stimulate action	32	\$253.22	\$5,400	\$2,703	\$8,103
	Sub-Total Task 5	60	\$200.05	\$9,300	\$2,703	\$12,003
	TOTAL BUDGET	1,056	\$145.80	\$134,550	\$15,420	\$153,970

VENDOR PREFERENCE CERTIFICATE

Certification and application* is hereby made for Preference in accordance with West Virginia Code, §5A-3-37. (Does not apply to construction contracts). West Virginia Code, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the West Virginia Code. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

- 1. Application is made for 2.5% resident vendor preference for the reason checked: Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; or, Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or, Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; or,
2. Application is made for 2.5% resident vendor preference for the reason checked: Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; or,
3. Application is made for 2.5% resident vendor preference for the reason checked: Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; or,
4. Application is made for 5% resident vendor preference for the reason checked: Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; or,
5. Application is made for 3.5% resident vendor preference who is a veteran for the reason checked: Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; or,
6. Application is made for 3.5% resident vendor preference who is a veteran for the reason checked: Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Under penalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: Center for Regional Econ. Comp Signed: [Signature]
Date: 8/10/10 Title: CEO

*Check any combination of preference consideration(s) indicated above, which you are entitled to receive.

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (*West Virginia Code §61-5-3*), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

WITNESS THE FOLLOWING SIGNATURE

Vendor's Name: Center for Regional Economic Competitiveness

Authorized Signature: [Signature] Date: 8/10/10

State of Virginia

County of Allegheny, to-wit:

Taken, subscribed, and sworn to before me this 10 day of August, 2010.

My Commission expires 12/31, 2011.

AFFIX SEAL HERE

NOTARY PUBLIC #707 6736
[Signature]

