

I. Records Management Procurement - Records Management Storage and Services for Workforce Customers IFB

Workforce Solutions Greater Dallas (WFSDallas) issued an Invitation for Bids (IFB) on January 25, 2011, for the purpose of exploring most competitive pricing for records management storage and services. In accordance with the Texas Workforce Commission Financial Manual for Grants and Contracts (FMGC), we are required to safeguard and maintain customer records, and supporting documentation for a period no less than three (3) years after the acceptance of the final audit report, unless any greater period which may be required by any specific funding source(s) or any litigation, audit or claim has begun before the expiration of the three-year period. In addition, we have responsibility to destroy/shred customer records after they have met the required records retention period.

The deadline date for proposals in response to the IFB was February 4, 2011. Since our office was closed on February 4 due to the inclement weather, we allowed for receipt of all proposals by close of business on Monday, February 7, 2011. Consideration for funding under the IFB placed emphasis on **overall responsiveness, experience and qualifications, quality of services and products, quality references, and competitiveness of cost for services.**

Please note that the Board requested cost for services to be set-pricing for a 12-month period and that cost was to be based on current archived services (2,340 boxes of customer records) and on ten 65 and four 95 gallon bins (picked up/emptied once a month) located at nine workforce centers and the Board's administrative office. Additionally, the Board allowed for cost of retrieval of records (that was only applicable to the current vendor of services) and for cost of transfer of records (that was only applicable to other than the current vendor of services) in the event that the current vendor of services was not selected to provide services in the future. All cost was evaluated for competitiveness of cost for services to be provided for a 12-month period.

The Board received three responsive proposals to the Records Management Storage and Services for Workforce Customers IFB: **Armstrong Archives, Inc., Carrollton; Corporate Records Management, Inc., Dallas;** and **Iron Mountain Inc., Irving,** the Board's current provider of services. The Board also received a non-responsive proposal from **SAFESITE INC, Dallas.** We returned the proposal to SAFESITE without review. The three responsive proposals were distributed to readers, evaluated, and scored. The results of the evaluation process are indicated in the table below.

Bid Proposer	Proposed Cost	Overall Responsiveness (5)	Experience/Qualifications (20)	Quality of Services/Products (40)	References (10)	Cost Reasonableness (25)	Total Score (100)
Armstrong Archives, Inc.	\$10,798	4.5	16	36	10	23.7	90.2
Corporate Records Management, Inc	\$11,585.28	5	15.7	28.3	10	19.7	78.7
Iron Mountain, Inc.	\$21,041.86	4.5	16.6	33.7	9	17	80.8

RECOMMENDATION: Board authorization for staff to negotiate a contract/an agreement with Armstrong Archives, Inc. to provide Records Management Storage and Services for Workforce Customers, including also destruction of records after meeting their required records retention period, from April 1, 2011 through March 31, 2012 at a cost not to exceed \$10,798. In addition, Armstrong Archives, Inc. communicated the following in the proposal provided its selection: "We will destroy all of the cartons you have currently earmarked for destruction at the on-boarding of your cartons at no cost to Workforce Solutions Greater Dallas".

II. MOMENTUM! PROFIT MATRIX

BUDGET PERIOD: September 1, 2009 - March 31, 2011

GOALS	Performance Target	Revised Performance Target	Meeting 80% of Target Earns 80% of Profit	Meeting 100% of Target Earns 100% of Profit
Displaced Workers Job Ready in 30 Days	2450	1642	1313	\$47,233
			\$37,787	
Displaced Workers Complete 10 weeks Participation	1350	1350	1080	\$37,786
			\$30,229	
Entered Employment of Displaced Workers Who Completed 10 weeks	850	850	680	\$9,447
			\$7,557	
Total			\$75,573	\$94,466

Transition Plan Deliverables:

1. Momentum! will provide training and video workshops for use by the ResCare system, offering continuity to current Momentum! customers and opportunities to future ResCare customers.
2. Momentum! will provide a list of current customer names (*actively enrolled, and those who may need additional services to find employment*).

RECOMMENDATION: Board authorization to approve the modified profit matrix as presented above and transition plan deliverables authorizing the negotiation for a one year continuation of training to be ratified in April.

III. Contract Amendments

Following a budget review of previous year's expenses and obligations, staff request authority to obligate additional funds for the following programs to provide for operational costs and new training opportunities to customers. The additional funds to be added to the following contractors:

Rescare Workforce Services

- **\$1,000,000** - Workforce Investment Act Adult funds (*a portion will be needed to pay for additional staff as well as ITA's, curriculum and work experience for customers*)
- **\$1,433,000** - Workforce Investment Act Dislocated Worker funds (*a portion will be needed to pay for additional staff as well as ITA's and internships for customers*)
- **\$200,000** - Trade Adjustment Assistance (TAA) funds (*contingent on TWC approval*)

In addition, Rescare has requested to voluntarily to reallocate funds from TANF staff salaries to direct customer subsidized employment activity and to de-obligate **\$346,800** from their existing TANF budget by reprogramming funds to Business Access to assist with employment retention efforts with TANF customers.

For Workforce Investment Act Youth funds, we have three contractors that provide youth services (Rescare Workforce Services, Richland College and Gulf Coast Trade Center). Rescare Workforce Services and Richland College both requested additional funds to serve additional youth through June 30, 2011. Gulf Coast Trade Center does not need additional funds at this time. Staff request to amend Rescare and Richland College contracts with the following:

- Rescare **\$183,000**
- Richland College **\$ 77,936**

Staff request to negotiate with the youth contractors for any residual funds to be ratified in April.

RECOMMENDATION: Board authorization to approve the amendment to ResCare's contract to include additional Workforce Investment Act Adult, Dislocated Worker, Youth funds and Trade Adjustment Assistance funds, pending approval from the TWC and Richland College to include additional Workforce Investment Act Youth funds.

IV. Business Access Contract Amendment

Staff will make available opportunities to youth and CHOICES/TANF customers through innovative ideas with Business Access. Business Access will offer an innovative online portal utilizing GreatJobs! by creating a specific Youth section on Workforce Solutions Greater Dallas job seeker web page and provide youth content management. This will enable youth to access online services through webinars. For CHOICES/TANF customers, Business Access will provide in-home learning opportunities. Staff request amending Business Access contracts with the following:

- \$265,000 Workforce Investment Act Youth funds to the Rapid Re-employment of UI Claimants contract; and
- \$346,800 CHOICES/TANF funds to the TANF vendor agreement with an extension through September 30, 2011

RECOMMENDATION: Board authorization to approve the amendment to Business Access' contract adding Workforce Investment Act Youth funds at cost not to exceed \$265,000 and CHOICES/TANF funds at cost not to exceed \$346,800.