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NYC DEPARTMENT OF SMALL BUSINESS SERVICES
PRE-RFP CONFERENCE FOR NEW PROGRAMS
110 WILLIAM STREET, 4TH FLOOR
SEPTEMBER 5, 2007
10:00 A.M.

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1 P R E S E N T:
2 LORENE GILMORE,
 Dept. Of Probation
3
4 ANGIE KAMATH,
 Assistant Commissioner, SBS
5 LIZA KHAN,
 CEO Representative
6
7 VANESSA MARTIN,
 Work Advancement Director
8 CHRIS NEOLE,
 Sector-Based Director
9
10 MEGAN O'MEARA
11
12 MELORRA SOCHET,
 Criminal Justice Director
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Also Present:
Sheridan Ameer, Chief Contracting Officer
Rivkah Berman
Pearl Chin
Martin Crong
Joseph A. Farrell
Dale Grant
Glen Gutterman
Luis Jimenez
Rebecca Lurie
Ms. Martinez

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2 (Time noted: 10:10 a.m.)
3 MS. KAMATH: Good morning. My name is
4 Angie Kamath, and I'm the Assistant Commissioner
5 for Program Design and Development here at SBS.
6 We're the unit that's responsible for rolling out
7 all the Center for Economic Opportunity's
8 initiatives for the working poor at SBS.
9 The purpose of today is to really give
10 prospective applicants for the RFPs more
11 information, or at least to clarify information, in
12 terms of what we put out in the concept papers
13 released at the end of June.
14 We want to be able to share with
15 prospective applicants our own thinking in terms of
16 the programs.
17 This is not a replacement for a bidders
18 conference, which will be forthcoming once the RFP

19 is released. There will be a bidders's conference
20 for each initiative.

21 This is meant to be a presentation of
22 our thinking and an opportunity for prospective
23 applicants to ask questions. Because there's such
24 a volume of new programs, the focus of these
25 programs is new and different, we felt it was

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2 important to give the applicant community more
3 information and to share it ahead of time.

4 The format for the presentation is a
5 presentation is a Power Point presentation given by
6 the work advancement team. There will be a Q and A
7 period where we answer questions until the end.

8 The entire event will be available in a
9 transcript, probably in about a week's time. The
10 transcript, as well as the Power Point that you
11 will see today will be on our website, the same
12 link as our concept paper on the SBS home page.

13 Everyone here today or who couldn't
14 make it will get a postcard in about a week with
15 the instructions and where to download the
16 materials. If you're not able to download the
17 materials, we'll have some of them as hard copies,
18 available for pickup at SBS.

19 If you need to step outside, feel free.
20 The bathrooms are to the left. I think that's it
21 in terms of introductory remarks.

22 We're joined today by some folks from
23 Deputy Mayor Gibbs' staff and the Center for
24 Economic Opportunity. I know they wanted to make
25 introductory comments.

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2 I want to introduce Liza Khan.

3 MS. KHAN: I'm Liza Khan, I work for
4 the Center for Economic Opportunity. I work on the
5 implementation of all of the work force development
6 projects.

7 To give some background, the CEO was
8 developed by Mayor Bloomberg to devise an
9 anti-poverty strategy for New York. The
10 antipoverty strategy is targeted for three groups:
11 The working poor, adults 16-24 and children 0 to 5.

12 SBS works on all those initiatives that
13 relate to the working poor target group. The CEO
14 also has an innovation fund, a \$150 million
15 innovation fund. About \$25 million goes to the
16 conditional cash transfer program, which you may
17 have read about in the papers; and \$125 million
18 goes to implement new programs with the city
19 agencies.

20 We will be overseeing a pretty rigorous
21 evaluation of each of the new initiatives; and
22 those evaluation results will be the... about
23 whether to continue funding these programs in the
24 future, or whether to try other strategies to
25 reduce poverty.

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2 This initiative in particular is geared
3 toward the working poor. There's over 300,000
4 working New Yorkers in poverty, and they comprise
5 46 percent of poor households in 2005.

6 The outcomes desired through this
7 program in particular are increased earnings and
8 career advancement. SBS will be managing the
9 contracts that are awarded. Again, the contractor
10 should expect to work closely with our team at City
11 Hall doing some of the evaluation work; as well as
12 our contractor that will be doing evaluations, as
13 well.

14 MS. KAMATH: I want to give a little
15 bit of context to those of you who may not be
16 familiar with SBS and our programs.

17 SBS was basically created -- the
18 Department of Small Business Services was created
19 in 2003 through a merger that Mayor Bloomberg
20 devised to really connect work force development
21 with Economic Development in a demand-driven
22 approach.

23 What we mean by demand driven is
24 simply, start with the businesses, start with the
25 labor market and then work backwards to find the

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2 training and preparation track that makes sense for
3 individuals to go through, to obtain those same
4 jobs and retain them and advance in this industries
5 and those careers.

6 In that time since we launched, we now
7 have six centers in the five boroughs. We've
8 placed nearly 28,000 individuals in jobs and worked
9 with about 3,000 businesses.

10 Really, I think what is exciting about
11 this moment in time and the Center for Economic
12 Opportunity initiatives at SBS is that we have made
13 a lot of placements and worked quite well in terms
14 of entry level jobs.

15 The next step for us is retention and
16 advancement. That is a theme that you will
17 definitely hear throughout this presentation with
18 all of our CEO initiatives.

19 In terms of our actual career centers,
20 we typically managed our contracts quite actively
21 and we have performance-based contracts. Again,
22 that's a theme that you will hear throughout new
23 programs.

24 Briefly, before we turn it over: A
25 couple of the guiding principles that are important

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2 to us as we developed all of our programs,
3 including this one, there are four bullets on the
4 bottom of the slide.

5 The first is to launch innovative
6 programs that have not previously been implemented
7 at New York City. Given that City Hall has taken
8 the bold step to create an innovation fund, we don't
9 just want to continue to support existing programs,
10 and there are good existing programs out there.

11 We really want to try something
12 different here, particularly focusing on the
13 working poor. Innovation is really critical to
14 that.

15 Secondly, moving the working poor out
16 of poverty through intervention tailored to the
17 needs of the working poor.

18 We fully expect when you target the
19 working poor population, you have to do things
20 differently. Whether that's how you deliver
21 services, where you deliver services, when you
22 deliver services, we're expecting this to be fairly
23 discrete and it needs to be tailored to that
24 population.

25 We want to leverage the existing career

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2 center system as much as possible. We talked
3 earlier about the 3,000 businesses that we started
4 through our career centers.
5 Where possible, those are relationships
6 that we could bring to the table to partner in all
7 programs, and to bring as many resources to bear
8 within our scope as possible.
9 Lastly, given this is a demand-driven
10 approach, we're working with businesses, and that's
11 a theme, really, I think you'll hear throughout the
12 work advancement program presentation.
13 It will be critical to really finding
14 working poor individuals, being able to work with
15 their employers to develop things, perhaps whether
16 they do not really exist.
17 With that, I'll turn it over to the
18 work advancement team.
19 MS. MARTIN: Good morning.
20 I'm in charge of the new work
21 advancement support center initiative at SBS. I'll
22 refer it to throughout the presentation as "WASC."
23 Rest assured that by the time a
24 contractor is chosen, that we will have a new name,
25 maybe catchier and sexier than the last one.

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2 I'm joined by Chris and... who also are
3 working with me.
4 Before I begin, I want to thank you for
5 coming to hear more about this new and exciting
6 program. I hope you'll leave with a better
7 understanding of WASC.
8 We'll begin with the program
9 objectives, which you'll see are twofold. The
10 primary objective is to help low income workers
11 qualify for higher wages, receive employer
12 sponsored benefits, access work support and provide
13 opportunities to advance in their careers.
14 In addition, since the WASC is an
15 employer-based program, which means that services
16 will be delivered to low wage workers and their
17 employers through the work place, the WASC will
18 also aim to make New York businesses more
19 competitive, by helping them meet work force skill
20 needs, address shortages of qualified workers,
21 employee retention and worker productivity.
22 WASC is based on a program model
23 created by MDRC, which is a nonprofit social policy
24 research organization. The program is based on the
25 national work advancement administration, also

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2 known as WASC, which also helps to advance low wage
3 workers out of poverty.

4 The WASC model is the subject of a
5 rigorous evaluation to test the effectiveness of
6 the advancement programs for low wage workers.
7 It's currently being implemented in four sites
8 around the country: Dayton, Ohio; San Diego,
9 California; Bridgeport, Connecticut; and Fort
10 Worth, Texas. The Fort Worth, Texas site is
11 entirely employer based.

12 There are many other programs around
13 the country that focus on retention and
14 advancement. A couple of examples here are the
15 Achieved Program in Cleveland, Ohio, which is an
16 employer based retention program that provides
17 on-site case management, assisted on job related
18 issues, to low wage earners in the major long term
19 nursing care industry.

20 This is also being evaluated by MBRC in
21 New York City. There's also the Advancement
22 Project in Seattle, Washington, which is an
23 advancement program that focuses on promoting job
24 retention, career advancement, economic
25 self-sufficiency, using a two-person case

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2 management team; one work force coach and one
3 Department of Social and Health Services case
4 manager.

5 Other examples include The Source,
6 located in Grand Rapids, Michigan; and San
7 Francisco Works, located in San Francisco,
8 California.

9 I just want to mention that these are
10 by no means all of the national retention
11 advancement programs throughout the country, but
12 just some that helped inform the design of the
13 WASC. If you're interested in learning more about
14 them, it's on the Internet.

15 The WASC model has two customers; the
16 individual worker and the employer. The workers
17 that will be recruited for WASC will be currently
18 employed at the participating employer, and must be
19 at least 18-years-old and earning \$14 per hour or
20 less.

21 The WASC will target employers
22 throughout New York City -- I want to emphasize
23 that any employer within New York City -- that are
24 interested in engaging WASC to address retention
25 and advancement issues for low income workers; and

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2 also employ a significant number of low wage
3 workers and have existing opportunities for the low
4 wage workers.
5 The WASC is a business driven model, in
6 the sense that it will locate retention and
7 advancement activities at employers, with the goals
8 of increasing retention rates by providing workers
9 with intensive job coaching, increasing
10 productivity through worker motivation; and
11 increasing skill levels through lower training
12 costs and on-site cost effective preparation.
13 Locating activities at the employer
14 also respond to the central challenge of the
15 initiative, which is engaging busy and low wage
16 workers, which many of you are familiar with.
17 Since it's expected that most
18 activities will take place at the work place, the
19 burden on workers to be able to make the time to
20 participate in the services will be lessened.
21 As mentioned, the scope of the WASC
22 will be citywide, to assist ion retention and
23 advancement needs.
24 There will also be outreach in the
25 Bedford-Stuyvesant community, to recruit Bedford

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2 Stuyvesant employers and to provide services
3 specifically to Bedford Stuyvesant program
4 participants, both employers and their low wage
5 workers, within the prescribed employer-based
6 service of the WASC.
7 I'll give a little bit of context to
8 that. The Mayor's Office of Comprehensive
9 Neighborhood Economic Development has targeted
10 communities to pilot intergovernmental approaches
11 to local economic development, and
12 Bedford-Stuyvesant is one such community.
13 As such, the physical location of the
14 WASC will be Bedford Stuyvesant.
15 The first and main goal of the WASC is
16 to reduce poverty and increase income for low wage
17 employees. In order to do this, it is expected
18 that 200 participants will secure advancement or
19 income upgrades in the first year, and an
20 additional 500 will secure advancement or income
21 upgrade annually, thereafter.
22 By job upgrading, we mean increasing
23 hours, wages or employer sponsored benefits. For
24 some, it could mean changing to a better shift.
25 However, that wouldn't be counted as an upgrade,

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2 since it's hard to place a dollar amount on
3 something like that.

4 Typical work supports and job upgrades
5 are intended to be short term goals within the
6 first 6 to 12 months. While career advancement is
7 considered more long term, and it's acknowledged it
8 might require complete particular training before
9 advancement to the next level.

10 The long term result is to increase
11 household income through earnings alone, to the
12 point where the individual has attained economic
13 self sufficiency and no longer needs financial work
14 supports.

15 The second goal is to provide employer
16 based retention and advancement services to
17 employers. For employers, we're expecting to see
18 increases in retention rates, product, as well as
19 higher job satisfaction.

20 In addition, by training participants
21 for higher level jobs, we're also expecting to see
22 an increase in employers to fill advancement
23 positions internally.

24 It is also worth noting that different
25 employers... and measuring the indicators

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2 differently, something we also acknowledge. For
3 this reason, final definitions and measurements for
4 these employer outcomes will be negotiated between
5 SBS and the WASC contractor.

6 The main components of WASC are as
7 follows: It is expected that WASC staff will work
8 with each participating employer to arrive at a
9 service design that is compatible with the needs of
10 the employer and the advancement goals of the
11 employee.

12 In implementing its program, it is
13 expected that the staff of the WASC will spend a
14 significant portion of its time in the field
15 working with WASC participating employers.

16 There are four core services of the
17 WASC. The first being education and training; the
18 second is individual job and career coaching; third
19 is work support activity; and the fourth financial
20 literacy and asset building.

21 I want to elaborate on the core
22 services a bit more; the first being education and
23 training. The expectation is that WASC staff will
24 identify opportunities to provide education and
25 training that contributes both to employer and

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2 employee outcomes, which I mentioned.

3 A few examples could include job
4 related skills training, including contextualized
5 literacy, customer service skills, process
6 improvement and communication.

7 Also, training groups of current entry
8 level workers at a firm to move into higher levels
9 or hard to fill positions.

10 There's also supervisory skill training
11 for existing work potential supervisors, and those
12 are some examples.

13 The second main core component I
14 mentioned is individual coaching. This is also
15 WASC staff would be expected to provide retention
16 and career coaching to eligible and interested
17 employees within a firm. Also, to work with each
18 participant to create an individual plan for
19 advancement and also to identify goals for
20 employment retention and income improvement,
21 including access to work supports.

22 A point made in the concept paper I
23 believe worth reiterating at this point is that
24 some participants we acknowledge again will move up
25 within their current employer, and others will

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2 access more skilled jobs at another employer,
3 either the same industry or an entirely new
4 occupation industry.

5 The third core service is connected to
6 work supports. WASC staff would recruit and screen
7 employees using Access NYC, or an equivalent
8 program for 20 work supports and benefits, such as
9 food stamps, child care, health care benefits and
10 tax credits; to strengthen job retention, and
11 ensure financial security.

12 The fourth and last core service of
13 WASC is financial literacy asset building. It's
14 also expected that WASC staff would connect
15 employees to bank accounts, credit repair, savings
16 programs, financial literacy workshops and
17 retirement accounts.

18 If you want more information for Access
19 NYC, their website is hometo.nyc.gov/access.nyc.

20 Finally, I want to give you more
21 information about the budget and contract.

22 It's anticipated that the contract for
23 the WASC will be three years, with an option to
24 renew. The budget of the WASC is estimated at
25 \$4.5 million over three years, with \$500,000

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2 allocated for start-up costs in the first year.

3 SBS also expects to award one contract
4 for the RFP, and there is also the expectation for
5 applicants to leverage additional resources and
6 funding to support this program.

7 This is the website for the concept
8 paper. There's also copies up here, in addition to
9 the criminal justice and...

10 So you know, comments may be submitted
11 on the conference paper up to September.

12 We'll open it up for questions and
13 answers.

14 MR. PEERS: I'm Randy Peers,
15 Opportunities for Better Tomorrow.

16 What's your name?

17 MS. MARTIN: Vanessa Martin is my name.

18 MR. PEERS: Since you are still working
19 for the employer outcome piece, I recognize your
20 need to negotiate that with your contractor.

21 But what would be really innovative is
22 if you had a flexible set of outcomes that you
23 would negotiate with individual businesses and
24 industries, because different businesses have
25 different needs.

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2 That's just a thought as you approach
3 this. The challenge is getting the employer to buy
4 in.

5 If you had individually negotiated
6 outcomes and plans for each business or targeted to
7 different sectors, it just might help in terms of
8 that volume. Because then they feel they're part
9 of that process.

10 MS. MARTIN: Thank you.

11 MS. MASTERS: I'm Kathleen Masters, from
12 CAMBA.

13 Can you define what you mean by a
14 Bedford-Stuyvesant employer? Is it the geographic
15 area, or Community Board 3?

16 MS. MARTIN: Yes; any local employer,
17 Community Board 3. I believe in the concept paper
18 we targeted industries; however, it's not really
19 limited to any industry. We are focusing -- prefer
20 to focus on growth industries where there's
21 advancement opportunities for low wage workers.
22 But it's not limited to any employer or industry.

23 MS. MASTERS: It's okay if they are
24 national chains or franchise operations, as long as
25 located within the community?

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2 MS. MARTIN: Correct.

3 MR. JIMENEZ: I'm from Peter Young
4 Housing.

5 Would SBS be willing to share their
6 findings in industry research THAT you might have
7 done?

8 MS. MARTIN: I'm not sure.

9 MR. JIMENEZ: When you talked about
10 businesses... what kind of research was done with
11 that?

12 MS. MARTIN: Some of that is stipulated
13 in the concept paper, and is further detailed in
14 the RFP; addressing any business needs or work
15 force challenges that particular employers have.

16 MR. PEERS: What connection, if any,
17 does the contractor need to have to the community
18 of Bedford-Stuyvesant?

19 MS. MARTIN: The idea is that the
20 Bedford-Stuyvesant goals will be articulated in the
21 RFP, something to mention. The idea is that there
22 will be outreach within the local community;
23 however the potential for applicants and proposers
24 to do that will be discussed, if appropriate.

25 MR. PEERS: They don't have to be Bed

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2 Sty per se, but to demonstrate effective outreach
3 in the Bed Sty community?

4 MS. MARTIN: It will be stipulated in
5 the RFP. The guidelines are clear in the RFP.

6 MS. NIGRO: Jeanette Nigro, from the
7 Brooklyn Chamber of Commerce.

8 You mentioned in the concept paper that
9 there would be possible partnerships. Assuming
10 this will be detailed in the RFP, can you speak
11 about collaborations and how they are fostered?

12 The assumption is it's a pretty large
13 contract. What vendor would be in the best
14 position to oversee the entire program? I'm
15 thinking about Great Partners in Brooklyn and
16 Queens that do some of this work very specifically
17 and, again, talking possibly two folks working
18 together.

19 MS. MARTIN: I think the expectation is
20 that there will be one award, with possible
21 subcontractors and partnerships. We know it is a
22 tall order and we expect it to be innovative, but
23 by no means do we expect one contractor to do this
24 alone; but we do expect partnerships.

25 MR. FARRELL: I'm Joe Farrell from

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2 Educational Day Assistance, Incorporated.
3 You refer in the concept paper to the
4 NDRC model. By that, do you mean employer
5 focussed, working with low income people? The
6 study had 15 or so agencies who are doing similar
7 work. Is anything more specific than that employer
8 focussed?
9 MS. MARTIN: The model is based on the
10 work advancement support center model. They also
11 do a retention and advancement model, 15 sites
12 nationwide.
13 This model is based on a lot of the
14 implementation findings and lessons learned from
15 both of those. It's strictly employer based. As I
16 mentioned, the Achieve Program in Cleveland is an
17 employer based program in the... evaluation I just
18 mentioned.
19 MR. FARRELL: The RFP will not be asking
20 us, "Here is the NDRC model, and you have to follow
21 that."
22 MS. MARTIN: No; by no means. The
23 concept is based on those models, but we don't
24 expect to replicate a model.
25 MS. YOUDELMAN: Sondra Youdelman, from

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2 Community Voices Heard.
3 I have question around the training
4 aspect. Is all training necessarily taking place
5 at the employer site; or are there potential
6 vouchers for outside training, and how does that
7 work? What's the coordination with the Work Force
8 1 Career Center?
9 MS. MARTIN: By no means do we expect
10 all training at the employer site. Again, using
11 the employer-based strategy, to lessen the burden
12 on individuals to go elsewhere to participate in
13 services such as training. It could be on-site, it
14 could be at the actual center or at a training
15 provider.
16 We're expecting collaboration with the
17 Work Force 1 career centers through possible
18 vouchers or whatever participants are eligible for.
19 Kind of leveraging as many resources as possible
20 for training.
21 THE SPEAKER: I'm... from the Federation
22 of...Agencies.
23 Who is responsible for conducting
24 outreach to workers potentially eligible for the
25 program? Is it the employers? Or would there be

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2 an effort to work with other community resources?
3 MS. MARTIN: The outreach to
4 individuals would be through WASC staff. WASC
5 staff would not only be recruiting employers, but
6 also eligible and interested workers.
7 THE SPEAKER: I'm... from the Gill Fund.
8 Does the employer have to have a
9 minimum number of employees working there?
10 MS. MARTIN: No. The expectation is
11 that they'll have a sufficient number of
12 individuals to meet the outcome. It's really up to
13 the contractor's discretion about how many
14 employers they end up recruiting and what makes the
15 program feasible, programatically, and what makes
16 the most sense.
17 THE SPEAKER: The program is --
18 retention and advancement is an economic model as
19 well as a work force development. You could work
20 with an employer and be doing a great job with the
21 employer and people are staying in the job.
22 However, in terms of individual
23 advancement, increases in salary, that sort of
24 stuff, they are sort of out of the employer's
25 control. Without changing jobs, which I don't

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2 think you want to happen -- people getting better
3 skills, not better jobs, but paying more, even a
4 competitor --
5 I want to hear about what discussions
6 you've had internally about the difficulties of
7 this particular model, because it has been
8 difficult to do in other places.
9 MS. MARTIN: I want to reiterate again
10 that we're really looking for creative and
11 innovative proposals for this. I acknowledge your
12 point, and I think there are some challenges to
13 working on retention and advancement. I do see
14 them working in tandem.
15 I think a lot of it will be in
16 recruiting the employers; recruiting employers who
17 have a vested interest in moving their individual
18 workers into higher paying positions.
19 I think a lot of it lies in targeting
20 employers, which are stipulated in much more detail
21 in the RFP; and a lot lies with that, I think.
22 MR. CRONGO: My name is Martin Crongo,
23 from Public Resources. I have a question regarding
24 the employment services.
25 By using CBC as a boundary, it

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2 artificially creates a boundary. I'm wondering, to
3 the extent that emphasis is on Bedford-Stuyvesant,
4 and recognizing you can use employers citywide to
5 meet the numbers and the reach growth targets, is
6 there any forecast about what percentage would be
7 Bedford-Stuyvesant, or what percentage outside
8 Bedford-Stuyvesant?

9 MS. MARTIN: To follow-up, I want to
10 clarify and emphasize that the scope and the reach
11 of the WASC is citywide. Employers could be
12 recruited from any of the five boroughs that work
13 with New York residents.

14 As we said, there is an outreach effort
15 that should be made in Bedford-Stuyvesant, and any
16 of the outcomes -- more information will be
17 stipulated in the RFP.

18 THE SPEAKER: I'm from Community Voices
19 Heard.

20 If you are only looking at Community
21 Board 3 and outreaching to employers citywide, you
22 must be looking for a particular type of employer.
23 Because if advancement is placed on higher paying
24 wages, what is the outcome for people with health
25 care? Because All low income jobs don't provide

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2 health care.

3 Are you also working with the employers
4 to retain these workers and put some money into
5 their health care fund or Medicaid, still the
6 health care source?

7 MS. MARTIN: That's part of the work
8 support piece, and there's also the asset building.

9 THE SPEAKER: There's earning income
10 credit, food stamps.

11 MS. MARTIN: Those are just examples of
12 them. They will screen for 20 or more.

13 THE SPEAKER: Health care is one of
14 them?

15 MS. MARTIN: Could be. We are not
16 explicitly saying.

17 THE SPEAKER: The city takes the low
18 end, giving food stamps and earned income credit.
19 Suppose you work in a low-income job that doesn't
20 provide health care, and don't fit into any of the
21 categories?

22 MS. MARTIN: The idea is that this is a
23 very new and innovative program, and to move people
24 into self-sufficiency.

25 Like I mentioned before, I think the

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2 recruitment of employers is very critical. You
3 want to recruit employers that have a invested
4 interest and have advancement opportunities for low
5 wage earners.

6 Whatever they can't achieve in the job
7 will be supplemented with work supports. There's a
8 holistic approach, not just getting people into
9 better jobs, but also acknowledging they might need
10 work supports in the short term to support them
11 financially; and also that they should build an
12 asset over time to help with their wealth and
13 income.

14 THE SPEAKER: I'm from Community Voices.
15 My question is this:

16 This pilot program could conceivably
17 run six years. What if -- have there been any
18 steps taken, because that's long past the
19 administration's tenure. Are there any steps to
20 have steps, any plans made to insure continuation
21 of the program past the administration?

22 MS. MARTIN: CEO funding for piloting
23 for three years. What we're looking for here are
24 effective programs, programs deemed effective.
25 There's always the possibility to renew contracts

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2 and extend the programs, but nothing will be -- we
3 can't definitely say anything until we know that
4 the programs are effective.

5 THE SPEAKER: When the new
6 administration comes in, the programs are
7 effective, and the new administration may not be
8 interested in continuing this. Are there...
9 brought to the table and thought out so possibly it
10 could be continued?

11 MS. MARTIN: We are anticipating a
12 three-year contract to overlap with a new
13 administration. That's what we are anticipating.
14 That's as best I can tell you, at this point.

15 THE SPEAKER: I have a question about
16 eligible self-employed, low income participants.

17 I'm thinking about child care workers,
18 low income or people who are home health aides,
19 self-employed. Are they eligible?

20 Again if you think about modeling and
21 about career advancement and training and
22 innovation, would those people as well be eligible
23 along with... the standard business model?

24 MS. MARTIN: Depending any type of
25 employer? Really, the focus here is on what's hard

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2 and fast, and employer based strategy. Individuals
3 would have to be currently employed and with a
4 participating employer.

5 THE SPEAKER: About the pilot nature,
6 again. On the evaluation, as well at the end of
7 the program, at what point in the life of this
8 contract and program will it be evaluated to the
9 point where the City would be willing to consider
10 another site for another similar WASC center in one
11 of the other community boards in desperate need of
12 this?

13 MS. MARTIN: I think a lot of it really
14 lies on the three-year contracts. We will look at
15 results if things are extremely effective, and
16 there's a really compelling need for another
17 center, we can always consider that before the
18 three years is up. Again, I think it all lies in
19 the pilot period, and that's three years.

20 THE SPEAKER: With respect to this
21 outcome about financial literacy, asset building
22 and encouragement of savings, which I think is a
23 very good important thing, and in terms of
24 retention and advancement, is the strategy that we
25 don't focus our attention on; maybe there's an

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2 opportunity, even if it's a pilot within a pilot,
3 to offer, sort of, matching funds for certain
4 levels of saving that happen, and maybe even
5 dovetail that with an existing employer savings
6 plan in place, to encourage people to invest in
7 retirement.

8 MS. MARTIN: That's a great suggestion.
9 We appreciate it.

10 MS. KAMATH: For those who were at the
11 Criminal Justice earlier this morning, we're very
12 much looking for very innovative approaches. So,
13 less for us to take into consideration, more for
14 potential contractors to think about in their
15 approach and that we're looking for holistic
16 approaches. To the extent that there's a
17 well-rounded application, that's what we are
18 looking for.

19 THE SPEAKER: In that specific
20 suggestion, in how you structure the RFP, you have
21 to make that an allowable expense within the budget
22 category, to set aside funding for certain matching
23 savings programs.

24 That's why -- it's good to throw some
25 of the suggestions prior to the development of the

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2 RFP.

3 MS. BERMAN: Rivkah Berman, from the
4 Jewish Community Council.

5 Other than going to the work force to
6 get training vouchers, will we be allowed to set
7 aside money for training? Will the RFP allow that?

8 MS. MARTIN: Yes.

9 MS. BERMAN: Other than vouchers?

10 MS. MARTIN: Yes. There's also an
11 expectation that other training sources will be
12 leveraged.

13 MS. BERMAN: That's very important for
14 work advancement. Thank you.

15 MS. MARTIN: The emphasis is on
16 research. Thank you.

17 THE SPEAKER: In the budget you spoke
18 of, there would be a \$500,000 advancement for the
19 first year start up. How much would have to be
20 paid back?

21 MS. MARTIN: This is in the RFP. It is
22 stipulated there.

23 MR. GUTTERMAN: Glen Gutterman,
24 StreetWise Partners.

25 For The training that takes place on

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2 site, what's the scope and depth you are looking
3 for, in terms of length of training programs and
4 frequency?

5 MS. MARTIN: It should be tailored to
6 the needs of the individuals and employer. It
7 depends on what the individual needs and what
8 needs, in terms of training, in order to advance in
9 that career or on their job; and what employers are
10 looking for.

11 Anything from three to four weeks of
12 training, to three or four months of training. It
13 is really -- It's really going to be tailored to
14 the needs of the individual.

15 MS. MARTIN: Thank you so much.