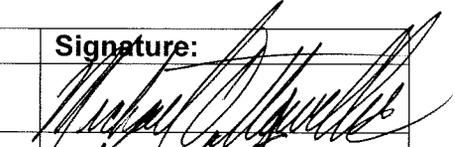
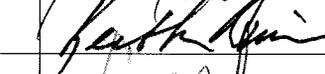
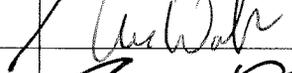
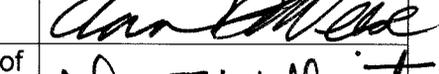
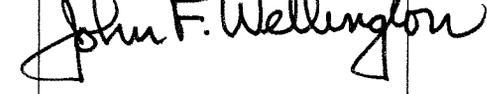
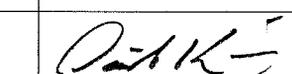
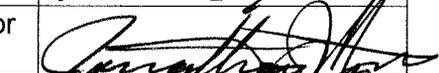
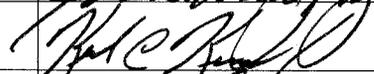


Strategic Skills Initiative Research and ID Grant Cover Sheet

Economic Development Region # 3 : Northeast Indiana

1. Funding Request		
Requested: \$267,877.00	Start Date: August 22, 2005	End Date: February 21, 2006
2. Designated Grantee		
Organization Name: Northeast Indiana Workforce Investment Board		Telephone Number: 260-459-1400
Address: 1415 Magnavox Way		Fax Number: 260-436-5973
Address: Suite 150		Email Address:
City: Fort Wayne	State: IN	Zip: 46804-1458
County: Allen	FEIN: 35-1572447	
3. Contact Person		
↑ Mr. x Ms. ↑ Dr. ↑ Other	First Name: Patricia	Last Name: Weddle
	Title: President & CEO	Telephone Number: 260-459-1400 x 204
Address: 1415 Magnavox Way		Fax Number: 260-436-5973
Address: Suite 150		Email Address: Patty.weddle@neiwb.org
City: Fort Wayne	State: IN	Zip: 46804-1548

Lead Team Members

Name:	Industry:	Title:	Signature:
Michael Ottenweller	Ottenweller Company, Inc.	President	
Keith Davis	Star Wealth Management	President	
Eric Walts	Bradner Village Health Care Center	Executive Administrator	
Aaron DeWeese	Marion-Grant County Chamber of Commerce	President	
John F. Wellington	Indiana-Purdue University Fort Wayne	Dean of School of Business & Management Sciences	
David Koenig	Region IIIA	Executive Director	
Jonathon J. Myers	Indiana Economic Development Council	Regional Director	
Kirk C. Kemmish	Northeast Indiana Corporate Council	President	
Michael Ripley	Adams County Economic Development Corporation	Executive Director	
Tom Braun	Central Labor Council	Labor Representative	

Strategic Skills Initiative Research and ID Grant
Economic Development Region #3: Northeast Indiana

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Strategic Skills Initiative Research & ID Grant

Economic Development Region #3: Northeast Indiana

I. Executive Summary

Indiana Department of Workforce Development's vision for a demand driven workforce development system is realized through its Strategic Skills Initiative (SSI). This initiative will prepare Indiana workers for new and increasing job opportunities in high growth, high demand and economically vital industries and sectors in our economy. Through the SSI, Economic Growth Region 3 (EGR 3) will work collaboratively with multiple regional sector partners to develop solutions with a clear line of site from root cause to solution development and implementation to address workforce challenges facing those industries and individuals. The efforts of regional partners, including service providers, educators, and economic and workforce development professionals will be improved resulting in a stronger regional economy.

Economic Growth Region 3 Consortium Lead Team

EGR 3 has assembled a strong consortium and lead team to drive the SSI in northeast Indiana. The Lead Team represents the entire geography and multiple sectors. Due to the size of the region (eleven counties), ten members have been engaged with priority given to those entities that have a regional focus. Likewise, we have identified a Consortium of subject matter experts that exceeds the suggested number of members in order to ensure adequate representation for all communities and sectors. Lead Team members are:

<u>Classification</u>	<u>Representative</u>	<u>Focus</u>
Business	Mike Ottenweller-President	Allen County
Manufacturing	Ottenweller Company, Inc.	
Business	Keith Davis – President	Regional
Advanced Business Services	Star Wealth Management	
Business	Eric Walts – Executive Administrator	Grant County
Life Sciences (Health)	Bradner Village Health Care Center	
Chamber of Commerce	Aaron DeWeese – President	Grant County
	Marion-Grant County Chamber of Commerce	
Education	John Wellington – Dean of School of Business & Mgmt. Sciences - IPFW	Regional
Post Secondary		
Economic Development	Dave Koenig – Executive Director Region III-A	Regional
Economic Development	Jon Myers – Regional Director Indiana Economic Development Council	Regional
Business	Kirk Kemmish – President NE Indiana Corporate Council	Regional
Economic Development	Mike Ripley – Executive Director Adams County Economic Development Corporation	Adams County
Labor Representative	Tom Braun – Labor Representative Central Labor Council	Regional

Strategic Skills Initiative Research & ID Grant

Economic Development Region #3: Northeast Indiana

Depth of Involvement and Input of Agencies and Entities

Depth of involvement is demonstrated by the methodology and scope of primary research collection. The SSI process will necessitate engagement of multiple stakeholders across our entire geography.

Planning Funds Requested: \$267,877.00

Research

EGR 3 will follow the methodology outlined in IDWD's RFA and in documents supplied by Workforce Associates. Major research and identification steps include:

- Collecting and analyzing secondary research and data and conducting primary research to determine occupational and skill shortages (mine the literature, conduct focus groups and surveys of key stakeholders)
- Collecting and analyzing secondary research and data, and conducting primary research to drill down to and then verify root causes of shortages (focus groups, surveys, interviews, and employer summits with key stakeholders)
- Collecting and analyzing secondary research to develop and then verify feasible solutions (mine the literature on best and promising practices, focus groups, interviews, and engagement of identified businesses and industries in regional solutions)

The SSI's procedures and processes, coupled with the capacity building opportunities delivered to the Northeast Indiana Workforce Investment Board's Core Agent and staff will serve to institutionalize a demand-driven approach to the Board's strategic investment of the public workforce dollars entrusted to it.

Strategic Skills Initiative Research & ID Grant

Economic Development Region #3: Northeast Indiana

II. Work Statement

a. Qualifications of Individuals Undertaking the Work

Patty Weddle - President & CEO

Northeast Indiana Workforce Investment Board

As Core Agent, Patty will be responsible for the overall accountability of the project. Patty has been President & CEO of NIWIB for more than four years. She holds a Bachelor's Degree in Business Administration with a specialty in Human Services Management. In addition to daily engagement in workforce issues, Patty previously served as Community and Economic Development Manager for GTE (now Verizon) with responsibility for 218 GTE communities in the state. This six-year assignment while at GTE has enabled Patty to develop numerous local, state, regional and national contacts related to both economic development and workforce development. In addition to membership in a number of economic and workforce development associations, Patty has been invited to be a presenter at national conferences as a subject matter expert.

Kathleen Randolph - Vice President of Operations

Northeast Indiana Workforce Investment Board

Since joining NIWIB in 2003, Kathleen has held various positions with the organization and was promoted to Vice President of Operations in the fall of 2004. Kathleen holds a Bachelor's Degree in Human Resource Development with a concentration in organizational behavior. Kathleen has day-to-day accountability for all programs and projects undertaken by NIWIB. Kathleen will have daily oversight of dedicated staff (SSI Program Manager) to ensure requirements outlined in the Work Plan have been met and are on target. Kathleen will also be responsible for engaging the appropriate constituents and ensuring that education and involvement of the Lead Team and Consortium is adequate to meet projected outcomes.

Beth Suman - Vice President of Finance/Controller

Northeast Indiana Workforce Investment Board

Beth serves as Fiscal Agent for the Local Elected Officials for the Northeast Indiana Workforce Investment Board and functions as the Vice President of Finance for the WIB. Having more than thirty years of experience in the accounting functions associated with the workforce system, Beth will ensure that procurement is properly executed and invoicing is done in the manner prescribed in the SSI Project materials. Beth has assisted in the preparation of the budget for this project and has revised the cost allocation plan to include the SSI project.

Strategic Skills Initiative Research & ID Grant

Economic Development Region #3: Northeast Indiana

Tom Fellrath - SSI Project Manager
Northeast Indiana Workforce Investment Board

After reviewing the qualifications and skills of sixteen applicants for the SSI Project Manager position, Tom Fellrath surfaced as the most qualified applicant and the candidate of choice. Tom's vast professional experiences include: Chamber of Commerce (Executive positions with both St. Joseph and East Allen Counties), Political Party Liaison/Lobbying, Finance Industry experience, Public Utility employee, and Congressional Intern (Committee on Labor and Human Resources)

A University of Notre Dame graduate with a degree in Government and International Studies, Tom is currently pursuing a Master of Public Affairs at IPFW. He also holds graduate distinction from the Institute for Organizational Management.

Tom was instrumental in assisting NIWIB in introducing WorkKeys to Chamber members in East Allen County. Additionally, he served as business' liaison for the Work Ethic pilot project in the East Allen County School system. Through his efforts, businesses in East Allen give preferential hiring to those students who have earned a Work Ethic certificate.

Tom has served on the Northeast Indiana Workforce Investment Board as a business representative and he knows and understands the programs and initiatives undertaken by the WIB to address skill shortages in the current ten-county region. With Tom's board experience, involvement with WIB initiatives and service on a number of board committees, Tom is prepared to begin this project with an intimate understanding and knowledge of the workforce investment board and the Workforce Investment Act legislation.

Karen Green - Operations Manager
Northeast Indiana Workforce Investment Board

As the systems expert for the NIWIB organization, Karen Green will be creating, tracking and reporting project activities through Microsoft Project. Karen is also responsible for including information on NIWIB's website, formatting of documents, providing technical assistance as needed and creating tracking and reporting processes and documents. Karen gained her knowledge of system design while working for Electronic Data Systems. She is a graduate of Eastern Michigan University with a Bachelor's degree in Business Administration majoring in Business Computer Systems.

Karen was an active volunteer with the WIB, serving on the Youth Council and chairing the Youth RFP Review Task Team, and then joined the WIB staff in January 2005. Her previous experience with Job Corps has been instrumental in redesigning the WIA funded youth programs.

Strategic Skills Initiative Research & ID Grant

Economic Development Region #3: Northeast Indiana

John Stafford - Director

Community Research Institute, Indiana-Purdue University at Fort Wayne

John's career path has provided significant professional experience across a variety of local government disciplines, including urban planning, land use regulations, community and economic development and municipal finance. This experience has also offered a valuable opportunity to work with local and state elected and appointed officials in both a public and private setting.

John holds a bachelor's degree from Ball State University, a Masters degree in Urban Planning from University of Illinois in Urbana-Champaign. Since 1977, John has been identified as the research and data guru for northeast Indiana. He has been commissioned to research and publish a number of projects for both the public and private sector.

In addition to being a master researcher, John served as legislative liaison for the City of Fort Wayne for five sessions and served as the registered lobbyist for the Greater Fort Wayne Chamber of Commerce at the General Assembly for three sessions.

Valerie Richard - Research Associate

Community Research Institute, Indiana-Purdue University at Fort Wayne

Valerie Richardson joined the staff of Community Research Institute in 1995 after spending over 10 years as an administrator in Purdue University's Business Office in West Lafayette. She received her M.B.A. from Indiana University (Kelley School of Business), and her B.S. degree in Biology from Purdue University. Her responsibilities at CRI involve developing and updating CRI's 2 major web sites: Community Research Institute, Allen County Profile; community-oriented project research, economic impact studies, and data analysis on the local economy. Her expertise is in the areas of tracking economic, employment and development trends. Valerie will be providing secondary research and data for this project.

Valerie will be assisting John Stafford with research conducted under the contract with Community Research Institute.

b. Coordinating Across WIB Boundaries to Include Economic Growth Region (EGR)

In addition to the ten counties currently served by the Northeast Indiana Workforce Investment Board, the new Economic Growth Region includes Wabash County. NIWIB will work with the members of the chamber of commerce and the Wabash Economic Development Corporation (WECOR) as members of the Region 3 Consortia. Additionally, NIWIB will use data collected

Strategic Skills Initiative Research & ID Grant

Economic Development Region #3: Northeast Indiana

from Wabash County in the research and analysis phase of the project and will incorporate businesses and workers from Wabash County in the primary research (focus groups and surveys). Public information sessions will be held in Wabash County as well as the other ten counties in the EGR.

Vicki Byrd, SSI Secondary Agent and President of Workforce Development Strategies, will be invited to assist with the convening of critical stakeholders from Wabash County. Vicki will be invited to share in the review of the analysis for Wabash to ensure that we have captured the culture and climate in that county.

c. Integration of Regional Sectors and Industry Representatives

Much effort went into the identification of the Lead Team as well as members of the Consortium to ensure that key industries and interests are adequately represented in the Research and Analysis Phase of this project. Additionally, due to the large size of EGR 3 (eleven counties), we opted to expand the Lead Team to ten members to ensure all geographical areas and constituents had adequate representation. We also focused on inviting those individuals and organizations that had a regional footprint. Likewise, we have identified a Consortium of numerous subject matter experts that exceed the recommended number of members in order to ensure adequate representation for all communities and sectors. (Attachment: Consortium Membership)

d. Primary Research

To implement the Strategic Skills Initiative in EGR 3, and to transform to a demand-driven system, we must know where the jobs are today and where the job opportunities will be in the future. We must be able to identify the key growth occupations in high growth industries in our EGR, the skills and competencies needed to perform those jobs, the skill gaps that our region is experiencing today and the projected skill gaps in the future. Demand driven workforce development strategies, and the investment of public dollars to support them, must be based on:

- Solid economic analysis
- Skills of the workforce
- Regional and local labor market conditions
- Economic development initiatives
- Industrial and occupational expansion and decline

The Strategic Skills Initiative is, by design, a demand driven strategy requiring the collection and analysis of both secondary and primary research and data in order to answer the above questions, thus providing real information for decision making and investment. EGR 3 Consortium intends to follow the IDWD methodology as outlined in the How-To Handbook.

Strategic Skills Initiative Research & ID Grant

Economic Development Region #3: Northeast Indiana

The six month SSI Research and Identification phase is logically divided into three sub phases. During the Occupation and Skills Shortages Identification sub phase, the consortium will review the literature and will analyze labor market information and statistical data, to identify the industries or clusters of industries critical to the economic vitality of northeast Indiana. Additional secondary data and information will be considered, including earlier economic and workforce studies and reports, such as the Top 100 Companies in Northeast Indiana, Region IIIA Strategic Economic Development Plan; NIWIB's State of the Workforce Report 2005; Fort Wayne-Allen County Economic Development Plan; Indiana Health Industry Forum's Indiana Life Sciences Report; and the regional industry cluster analyses.

In addition to the secondary data, primary research will be conducted by the consortium and its staff. Research methodology and tools will be developed. Focus groups of industry leaders, Chambers of Commerce, economic developers, local elected officials, and other key informants will be interviewed and surveyed. A regional workforce summit will be held. By the conclusion of this sub phase, critical high growth, high wage industries and the skills and capacities needed in their workforces will be identified for further study. The Occupations and Skill Shortages report will be prepared and submitted to IDWD.

Once those industries and industry clusters and the requisite workforce skills are identified, the consortium will drill down to root causes for the existing skill gaps. During this sub phase additional secondary data will be considered and a substantial amount of primary research will be conducted and then verified. One-on-one interviews with industry leaders; focus groups with human resource managers, incumbent workers, dislocated workers, service providers, and multi-sector partners; employer summits; and surveys will be conducted to determine root causes and, once determined, to verify them with stakeholders. During this sub phase specific companies in the high growth high wage industries targeted will be identified and engaged for implementing solutions at the conclusion of the Research and Identification phase. The Root Causes report will be prepared and submitted to IDWD.

The final sub phase of Research and Identification will develop regional solutions aimed at root causes. Development of Regional Solutions must be derived from the extensive research and analysis conducted in the first two sub phases. The consortium, with industry representatives, business leaders and other stakeholders will develop regional solutions to the workforce occupation and skills gaps. Regional solutions will be verified with workers, service providers, and incumbent and dislocated workers through primary research methodologies to assure feasibility of proposed solutions through focus groups, surveys, and industry association groups. Line of sight will be clear with

Strategic Skills Initiative Research & ID Grant

Economic Development Region #3: Northeast Indiana

solutions directly linked to root causes. The Solutions Report will be prepared and submitted to IDWD.

e. Building Staff Capacity

Throughout the Research and Identification phases, EGR 3 Consortium and staff will participate in all SSI workshops (12) and webinars (3) provided by Workforce Associates. WIB staff is already in direct contact with Workforce Associates to schedule the SSI workshops for EGR 3. Participation in these learning opportunities by all NIWIB staff and the consortium, coupled with technical assistance from Workforce Associates, will institutionalize SSI's demand-driven process and strategy at the regional level, and will establish new practices and methodologies for a demand-driven system in northeast Indiana.

The EGR 3 consortium will also be assisted by the Community Research Institute research staff for further analysis of secondary and primary research and to access additional data sources such as Dun and Bradstreet and their data analysis service through zapdata.com.

Staff has already accessed other education and training opportunities on demand driven strategies through on line sources such as www.workforce3one.org webinars, and NAWDP trainings. Staff resources are being dedicated to learning new processes for making strategic investments of workforce dollars entrusted to our region.

EGR 3 staff has been expanded through the hiring of a project manager, whose job it will be to lead the Strategic Skills Initiative. With this addition and the dedication of specified percentages of time of other NIWIB staff, there will be sufficient staff capacity to develop and execute the SSI Planning Phase activities within the required time frame.

Staff will be supplemented through the assistance of the regional Community Research Institute at Indiana Purdue University-Fort Wayne. CRI has established itself as the regional repository of data and data analysis for northeast Indiana. CRI consultants will provide additional training and education in economic and labor market analysis to the NIWIB staff in order to institutionalize the SSI process and procedures. NIWIB believes it is critical to engage CRI to assist in deeper levels of analysis of the regional economy because the sources of secondary research and data are largely incomplete. CRI has the capacity and expertise on knowing where the data exists and when and how to access it.

All of these efforts will embed demand driven strategies and processes and will change the ways NIWIB approaches strategic investment of workforce dollars.

Strategic Skills Initiative EGR # 3 : Northeast Indiana
 Planning Activities and Schedule

Project Activity 1: Assemble SSI Consortium and Lead Team	Timeline: July 11 – July 31	Staff Responsible & Agency: Patty Weddle, President/CEO Northeast Indiana Workforce Investment Board and Core Agent for EGR #3	Effort/Work Hours: 35 hours	Product Produced (if applicable): Consortium and lead team established
Project Activity 2: Develop SSI project plan, budget, schedule and application	Timeline: July 11 – August 3	Staff Responsible & Agency: Core Agent and NIWIB Senior Management Staff	Effort/Work Hours: 72 hours	Product Produced (if applicable): SSI Project plan, timeline and budget and SSI Application
Project Activity 3: Hire SSI Project Manager	Timeline: July 11 – August 3	Staff Responsible & Agency: Core Agent and NIWIB Staff	Effort/Work Hours: 28 hours	Product Produced (if applicable): Project manager on board
Project Activity 4: Plan and host SSI roll-out workshops and meetings for EGR 3	Timeline: July 11 – August 15	Staff Responsibility & Agency: Core Agent and NIWIB staff	Effort/Work Hours: 30 hours	Product Produced (if applicable): Key stakeholders engaged
Project Activity 5: Participate in SSI Workshops (5) and Webinars (1)	Timeline: September 1 – October 21	Staff Responsible & Agency: Workforce Associates; SSI Project Manager, CRI Consultant, NIWIB staff	Effort/Work Hours: 34 hours	Product Produced (if applicable): Increased NIWIB staff capacity Institutionalization of SSI process
Project Activity 6: Research and Identification Phase – Identify Occupations and Skill Gaps: Collect and analyze secondary research and data, including: previous studies and plans	Timeline: August 15 – October 21	Staff Responsible & Agency: SSI Project Manager, CRI consultants, NIWIB staff	Effort/Work Hours: 400 hours	Product Produced (if applicable): Alignment of economic and workforce development plans; EGR 3 High growth industries and jobs identified; Increased staff skill in data analysis
Project Activity 7: Research and Id Phase Identify Occupations and Skill Gaps –Determine primary research methodology and develop research tools	Timeline: August 15 – September 1	Staff Responsible & Agency: SSI Project Manager, CRI Consultant, NIWIB staff	Effort/Work Hours: 140 hours	Product Produced (if applicable): Primary research methodology and tools

<p>Project Activity 8: Conduct and analyze primary research: Focus groups and interviews with key industry leaders, LEDOs, LEOs, Chambers, Regional Workforce Summit</p>	<p>Timeline: September 1 – October 14</p>	<p>Staff Responsible & Agency: SSI Project Manager, CRI Consultant, NIWIB staff</p>	<p>Effort/Work Hours: 100 hours</p>	<p>Product Produced (if applicable): Primary research results for upcoming reports</p>
<p>Project Activity 9: Prepare and submit Occupation and Skill Gap Shortage Report</p>	<p>Timeline: October 14 – 21</p>	<p>Staff Responsible & Agency: SSI Project manager, NIWIB staff, CRI consultant</p>	<p>Effort/Work Hours: 64 hours</p>	<p>Product Produced (if applicable): Occupation and Skills Shortage Report</p>
<p>Project Activity 10: Research Id Phase – Determine Root Causes Participate in SSI Workshops (4) and Webinar (1)</p>	<p>Timeline: November 1 – 16</p>	<p>Staff Responsible & Agency: Core Agent, SSI Project Manager, NIWIB staff, CRI Consultant</p>	<p>Effort/Work Hours: 35 hours</p>	<p>Product Produced (if applicable): Increased NIWIB staff capacity Institutionalization of SSI process</p>
<p>Project Activity 11: Conduct primary research on root cause: Focus groups of incumbent workers for each industry or clusters of industries identified; focus group of Dislocated workers; LEOs, Economic Developers; online surveys; interviews of industry leaders; host multi-partner forum; focus group of Economic Developers; Human Resource managers for each industry and company identified; conduct online survey (surveymonkey.com); individual interviews</p>	<p>Timeline: November 1 – December 2</p>	<p>Staff Responsible & Agency: Core Agent, NIWIB staff, SSI Project Manager, CRI Consultant</p>	<p>Effort/Work Hours: 200 hours</p>	<p>Product Produced (if applicable): Reports, publications</p>
<p>Project Activity 12: Analyze primary research to determine root cause</p>	<p>Timeline: November 1 – December 2</p>	<p>Staff Responsible & Agency: SSI Project Manager, NIWIB staff, CRI Consultant</p>	<p>Effort/Work Hours: 75 hours</p>	<p>Product Produced (if applicable): Root cause(s) determined</p>

Project Activity 13: Verify primary research and analysis of root cause with industry and business leaders; incumbent and dislocated workers	Timeline: November 30 – December 8	Staff Responsible & Agency: SSI Project Manager; NIWIB staff, NIWIB Incumbent Worker Council, Service Providers, SSI Consortium	Effort/Work Hours: 22 hours	Product Produced (if applicable): Root Cause verified Specific employers and industries buy in
Project Activity 14: Prepare and Submit Root Causes Report	Timeline: December 9 - 16	Staff Responsible & Agency: SSI Project Manager, NIWIB Staff	Effort/Work Hours: 55 hours	Product Produced (if applicable): Root Cause Report
Project Activity 15: Regional Solutions: Participate in SSI Workshops (3) and webinars (1)	Timeline: January 2 – February 21	Staff Responsible & Agency: SSI Project Manager, NIWIB staff, CRI Consultant, Consortium	Effort/Work Hours: 30 hours	Product Produced (if applicable): Increased staff knowledge and skill; institutionalization of SSI process and procedures
Project Activity 16: Analyze primary and secondary data and research: current literature, best and promising practices	Timeline: January 2 – February 1	Staff Responsible & Agency: Core Agent, SSI Project Manager, NIWIB staff, Consortium	Effort/Work Hours: 50 hours	Product Produced (if applicable): Report
Project Activity 17: Engage stakeholders to devise and determine feasibility of solutions: focus groups with industry contacts, training providers, and economic developers; host Workforce Summit II	Timeline: January 2 – February 1	Staff Responsible & Agency: Core Agent, SSI Project Manager, NIWIB staff, Consortium	Effort/Work Hours: 15 hours	Product Produced (if applicable): Root causes identified
Project Activity 18: Develop solutions package and affirm partnerships with industries and other agencies	Timeline: January 10 – February 15	Staff Responsible & Agency: Core Agent, SSI Project Manager, NIWIB staff, Consortium	Effort/Work Hours: 219 hours	Product Produced (if applicable): Solutions and implementation plan
Project Activity 19: Leverage existing resources with local funds for solution implementation	Timeline: February 2 - 19	Staff Responsible & Agency: Core Agent, SSI Project Manager, NIWIB staff	Effort/Work Hours: 33 hours	Product Produced (if applicable): Financial resources
Project Activity 20: Submit Regional Solutions report and Request for Funding	Timeline: February 21	Staff Responsible & Agency: Core Agent, SSI Project Manager, NIWIB staff	Effort/Work Hours: 33 hours	Product Produced (if applicable): Report and application submitted

Strategic Skills Initiative Research & ID Grant
Line Item Budget Request

Economic Growth Region # 3 : Northeast Indiana

ITEM	AMOUNT REQUESTED
1. Staff Costs	\$134,181
2. Consultant Assistance	\$50,000
3. Travel Expenses	\$7,158
4. Other Expenses	\$76,538
TOTAL REQUEST	\$267,877

1. **Staff Costs:** Prorated wages and benefit costs for that portion of time staff actively work on the project. Staff time charged to the project must be documented (i.e. time sheets).
2. **Consultant Assistance:** Costs for consultants assisting with the project. Include both consultant fees and expenses here. Please note that contracts for consultant services must meet all applicable state and local procurement requirements
3. **Travel Expenses:** Transportation (i.e. mileage), lodging, and meals (or Per Diem) costs for staff and other personnel (excluding consultants) participating in the project.
4. **Other Expenses:** Include costs such as: meeting room costs; purchase of data, reports, and materials; data processing fees; and printing expenses.

***NOTICE:** Attach a detailed justification for all requested costs by line item. The justification must explain what is being requested in relation to the work statement, as well as the “reasonableness” of the amount being requested – this is a critical piece that must be well developed in order for the state to determine final funding levels.

Line Item Budget Justification

Staff Costs:		\$134,181
President and CEO	15%	
Vice President/Operations	35%	
Vice President/Finance	10%	
Operations Manager	10%	
Project Manager	100%	
Business Services Coordinator	5%	
Clerical Assistance	10%	
Fringe Benefits are calculated at 20% of the wages paid.		
Consultant Assistance:		50,000
Community Research Institute	50,000	
Travel Expenses:		7,158
Mileage at .405 cents per mile for the Project Manager (550 miles per month for 9 months)	2,005	
Mileage at .405 cents per mile for other WIB Staff (250 miles per month for 9 months)	914	
Registration Fees (Project Manager and other WIB Staff)	500	
Lodging and Per Diem (Project Manager and other WIB Staff)	500	
Mileage at .405 cents per mile for Lead Team (889 miles per month for 9 months for Lead Team)	3,240	
Other Expenses:		76,538
Office supplies	2,570	
General Liability and Bonding Insurance	518	
Payroll Processing	825	
Legal Expense	518	
Financial Software Support	1,312	
Audit Expense	816	
Dun and Bradstreet Data Maintenance Expense	750	
Technology Expense	3,975	
Phone/Internet/Postage	3,002	
Maintenance Agreements (Copier/Postage Meter)	1,382	
Office Space	7,586	
Equipment/Software (Project Manager)	4,000	
Books and Subscriptions Expense (Project Coordinator and other WIB Staff)	1,480	
Meetings Expense (12 meetings @ \$500 each and 2 meetings @ \$1,500 each)	9,000	
Printing Expense (Personal items related to the Project Manager such as business cards and also expenses associated with the printing of research results)	15,400	
Job Vacancy Survey	13,454	
IDWD/WA SSI Workshops	9,950	
Total Request		\$267,877



Prior Approval Request Community Research Institute (CRI)

Purpose of the Sole Source Agreement

To conduct research and labor market analysis related to EGR 3's Strategic Skills Initiative, and to provide education and training in data collection and analysis to NIWIB staff in order to increase their capacity to perform, and thus institutionalize, data driven strategic investments and demand driven workforce development strategies.

Dollar Amount of the Procurement

NIWIB seeks to enter into a Professional Services Agreement with Community Research Institute (CRI) for total cost of services not to exceed \$50,000. This \$50,000 represents an hourly rate of **\$80** per hour for a total of 625 hours.

Justification for the Sole Source Procurement

NIWIB requests approval for this sole source procurement because an agreement with CRI is the "best possible" choice to accomplish the goals and objectives of the Strategic Skills Initiative. CRI currently has a myriad of research they have previously conducted in our region that would serve as a source of the secondary research to begin the data review process. The documents considered were largely researched and written by the CRI staff. NIWIB believes that CRI will bring to the table data that is available for NIWIB's immediate use, thus enabling NIWIB to "hit the ground running" in our efforts to accomplish outcomes required in the SSI. NIWIB's past experiences with CRI has demonstrated their ability to respond, produce and present data that will meet the needs of this initiative.

NIWIB believes strongly in having local assistance in the development of staff expertise due to the accessibility and availability of the consultant. There is much work to complete in the six-month data collection and analysis phase of this project. The combination of dedicated NIWIB staff and the CRI research staff will ensure our ability to meet critical deadlines.

Copy of the Cost and/or Price Analysis

NIWIB investigated costs for research and analysis from seven consulting companies. The range was from \$65 to \$582 per hour, with most companies adding the cost of travel to the hourly rate. A contract with CRI would result in an hourly rate comparable to the low end of the quotes and their rate includes the cost of local travel. Additionally, CRI is an Indiana-based organization. Only two other companies were Indiana-based.

The following is a summary of our research for rates:

- Workforce Associates - \$65/hr plus travel expenses**
- The Medical Group - \$85/hr plus travel expenses
- Partnership for Quality - \$75/hr plus travel expenses
- Ascent Global - \$475 to \$582/hr plus travel expenses
- Rizzo & Associates - \$150/hr
- Record Consulting Services - \$230/hr plus travel expenses
- Mission Enablers - \$115/hr plus travel**

** = Indiana-based organization

Note: Workforce Associates is ineligible to provide research services for NIWIB due to their contract with the State of Indiana for the overall SSI Project.

Thank you for considering NIWIB's request to sole source research and analysis and education and training for capacity building services associated with the Strategic Skills Initiative.



ERISS Corporation

16644 W. Bernardo Drive, Suite 100
San Diego, CA 92127
Ph: (858) 675-9800
Email: info@eriss.com

Invoice

DATE	INVOICE #
8/26/2005	9990

BILL TO
Northeast Indiana WIB Patty Weddle 1415 Magnavox Way, Suite 150 Fort Wayne, IN 46804

P.O. NO.	TERMS
	Per Contract

DESCRIPTION	AMOUNT
Job Market Survey 2005, per statewide initiative with Indiana Workforce Board.	13,454.55
Thank you for your business.	Total \$13,454.55

Tax ID #33-0228542

Strategic Skills Initiative Research and Grant

Economic Development Region #3: Northeast Indiana

Attachment: Consortium Membership

Classification	Member Name	Organization	Focus
Economic Development	Garry Jones	Wells County	
	*Mike Ripley	Adams County	State Representative
	Tim Eckerle	Grant County	
	Mark Royse	Allen County	
	Gary Nielander	Steuben County	
	Dorinda Heiden	Whitley County	
	Norm Yoder	DeKalb County	Mayor City of Auburn
	Carol Pugh	Huntington County	
	To be determined	Noble County	
	Kim Forte	LaGrange County	
	Chris Martin	Wabash County	
	*Jon Myers	IEDC	12 counties in NE Indiana (includes Jay & Blackford)
	*Dave Koenig	Region 3A	5 counties in NE Indiana
Lincoln Schrock	Indiana NE Development	Provides leads for 10 counties of NE Indiana	
Regional Employers	Ryan Stoneburner	HR America	Nationwide HR Company; HR services
	Bruce Menshy	Raytheon	Advanced Manufacturing and Design; Engineers
	Larry Rowland	Lincoln Financial	Advanced business services
	Deb Stam	Parkview Hospital	Healthcare
	Bruce Hamilton	Lutheran Hospital	Healthcare
	To be determined	NIHRA	HR Association for NE Indiana
	Larry Graham	NIPSCO	Utility
	*Keith Davis	Star Wealth Management	Advanced business services
	*Eric Walts	Bradner Village Healthcare	Healthcare
	*Kirk Kemmish	Corporate Council	Represents 40 companies; Foundations in NE Indiana
*Mike Ottenweller	Ottenweller Company	Advance Manufacturing	
Jane Howard	Verizon	Telecommunications	
Education	Mark Daniel	Leo High School; Principal	High Schools
	Jim Compton	North Adams Community Schools; Superintendent	K-12
	Mark Keen	Ivy Tech State College; Dean of Academic Affairs	Post Secondary
	Jeremy Diller	Taylor University	Post Secondary
	Deb Conklin	IPFW; Continuing Education	Post Secondary
	Ned Keiser	Huntington College; Entrepreneurship	Post Secondary
	*John Wellington	IPFW; Dean of School of Business and Management	Post Secondary; Graduate Program
Chambers	Mike Landrum	Greater FW Chamber	
	*Aaron DeWeese	Grant County Chamber	
	Luann Coda	Kendallville Chamber	
	Jill Boggs	Angola Chamber	
Labor	Dennis Silkworth	Union Representative	State Employees
	Leroy Jackson	Union Representative	Skilled Trades
	Larry Moran	Union Representative	Construction
	*Tom Braun	Central Labor Council	Manufacturing

* Represents Lead Team Member