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CONTRACT

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THIS CONTRACT ("Contract") is entered into, in duplicate, effective as of August 8, 2017, for reference purposes only, pursuant to a minute order adopted by the City Council of the City of Long Beach at its meeting held on July 18, 2017, by and between PERFORMANCE EXCELLENCE PARTNERS, LLC, a Delaware limited liability company ("Contractor"), with offices located at 7911 Professional Circle, Huntington Beach, California 92648, and the CITY OF LONG BEACH, a municipal corporation ("City") and administering entity for Pacific Gateway Workforce Investment Network.

WHEREAS, City submitted an application ("Application") to the Employment Development Department of the State of California (the "State"), for funds to provide meaningful training and employment opportunities for economically disadvantaged, unemployed and underemployed persons consistent with the Workforce Investment Act of 1998 ("WIA") codified as Section 504 of the Rehabilitation Act, 29 U.S.C. 794(d) and all regulations, directives, policies, procedures and amendments issued thereto and/or legislation, regulations, policies, directives, and/or procedures which may replace the Workforce Investment Act; and

WHEREAS, Congress reauthorized the Workforce Investment Act of 1998 on July 22, 2014 as the "Workforce Innovation and Opportunity Act (WIOA)" to provide workforce investment activities, through statewide and local workforce investment systems such as Pacific Gateway Workforce Investment Network (PGWIN), administered by the City of Long Beach; and

WHEREAS, the Application was approved by the State and a Workforce Investment Act/Workforce Innovation and Opportunity Act subgrant has been executed by and between the State and the City authorizing such programs and providing the funding therefore under Workforce Investment Act/Workforce Innovation and Opportunity Act Master Subgrant Agreement which has been designated as K7102038 CFDA No. 17.258 and 17.278 the ("Prime Contract"); and

1 WHEREAS, Contractor desires to participate in said program and is qualified
2 by procurement for the reason of experience, preparation, organization, staffing and
3 facilities to provide services; and

4 WHEREAS, City is willing to utilize Contractor to provide various workforce
5 development services to Pacific Gateway and its Board;

6 NOW, THEREFORE, in consideration of the mutual terms, covenants, and
7 conditions in this Agreement, the parties agree as follows:

8 1. DOCUMENT INCORPORATION.

9 A. The following documents are attached hereto as exhibits and
10 incorporated herein and made a part hereof by this reference as if fully set forth:

11 i. The Prime Contract, Exhibit "A", and any extension or
12 continuation thereof or any grant agreement which is the successor thereto
13 which authorizes a training and employment program for the economically
14 disadvantaged, unemployed and underemployed persons, and the
15 documents incorporated therein and attachments thereto, including the
16 assurances and certifications made by the State to the City.

17 ii. Contractor's program description, statement of work
18 performed, Contractor's operation plan for participants, program conditions
19 and standards for Contractor's performance under this Contract (collectively,
20 the "Statement of Work") attached hereto as Exhibit "B".

21 B. Contractor and City agree to be bound by all the terms,
22 conditions and provisions contained in the Prime Contract, the Application, and the
23 Statement of Work (collectively, the "Contract Documents").

24 C. Contractor hereby agrees to assume full responsibility for the
25 performance of the operation, coordination and administration of such program
26 pursuant to all the terms and conditions of the exhibits to the extent that said
27 documents are applicable to the delivery of services by Contractor hereunder; and
28 the parties hereto agree to perform all duties, obligations and tasks to be performed

1 by each party under the Contract Documents.

2 D. In the event there is any conflict between the provisions of this
3 Contract and the provisions of the Prime Contract, including the attachments thereto
4 and the documents incorporated therein, as presently worded or amended in the
5 future, the parties agree that the provisions of the Prime Contract shall control.

6 Contractor shall conduct training and employment activities in accordance
7 with the provisions of the Contract Documents.

8 2. TERM.

9 A. The term of this Contract ("Term") shall be deemed to have
10 commenced as of July 1, 2017, and unless sooner terminated pursuant to the
11 provisions hereof, shall terminate on June 30, 2019. Either of the parties hereto
12 shall have the right to terminate this Contract in its entirety at any time during the
13 Term for any or no reason whatsoever by giving fifteen (15) days prior written notice
14 of termination to the other party. City shall have the additional right to cancel any
15 part of this Contract at any time during the Term for any reason whatsoever by giving
16 fifteen (15) days' notice of such cancellation to the Contractor.

17 B. Notwithstanding the foregoing, the City shall have the right to
18 terminate and cancel this Contract without notice, in its sole discretion, if the actions
19 or non-action of Contractor subjects the City to liability, legal obligations or program
20 operation obligations beyond the liability and obligations under the Contract
21 Documents. If this Contract is terminated prior to the expiration of the Term,
22 Contractor shall be reimbursed for all eligible program allowable costs which have
23 been accrued but not paid through the effective date of termination. Contractor
24 agrees to accept such amount, plus all amounts previously paid, as full payment
25 and satisfaction of all obligations of City to Contractor.

26 3. AWARD UNDER SPECIAL CONDITIONS. The City may award a
27 contract under special conditions if it determines the Contractor as "high risk" under the
28 following categories:

1 A. (1) A history of unsatisfactory performance, or (2) Is not
2 financially stable, or (3) Has a management system which does not meet the
3 management standards, or (4) Has not conformed to terms and conditions of
4 previous awards, or (5) Is otherwise not responsible; and if the City determines that
5 an award will be made, special conditions and/or restrictions shall correspond to the
6 high risk condition and shall be included in the award.

7 B. Special conditions or restrictions may include: (1) Payment on
8 a reimbursement basis; (2) Withholding authority to proceed to the next phase until
9 receipt of evidence of acceptable performance within a given funding period; (3)
10 Requiring additional, more detailed financial reports; (4) Additional project
11 monitoring; (5) Requiring the Contractor to obtain technical or management
12 assistance; or (6) Establishing additional prior approvals.

13 C. If the City decides to impose such conditions, the City will either
14 include such corrective action in the Statement of Work or notify the Contractor as
15 early as possible, in writing, of: (1) The nature of the special conditions/restrictions;
16 (2) The reason(s) for imposing them; (3) The corrective actions which must be taken
17 before they will be removed and the time allowed for completing the corrective
18 actions and (4) The method of requesting reconsideration of the conditions or
19 restrictions imposed.

20 4. PERFORMANCE REVIEW.

21 A. After each quarter during the Term, the City will conduct a
22 review of Contractor's performance by comparing the Contractor's planned
23 performance and/or contract earning levels with the actual performance and
24 contract earning levels achieved by Contractor. If the Contractor is ten percent
25 (10%) or more below their planned total at the end of the first quarter or any quarter
26 thereafter, the City has the right to unilaterally cancel the contract or de-obligate
27 funds up to the amount of the under expenditure or underperformance.
28 Alternatively, upon review and approval of the City, Contractor may be allowed to

1 submit a corrective action plan demonstrating that program performance is
2 attainable and expenditure levels can be met. At the discretion of the City,
3 Contractor may be allowed to continue program services.

4 B. Underperformance at the end of the second quarter or any
5 quarter thereafter, shall permit the City to unilaterally cancel this Contract or, in the
6 alternative and at the sole discretion of the City, deobligate funds from this Contract
7 up to the amount of the underexpenditures.

8 5. CONTRACT AMOUNT AND PAYMENT.

9 A. The total amount which shall be payable by City to Contractor
10 for Contractor's allowable services during the Term shall not exceed One Hundred
11 Ninety Thousand Dollars (\$190,000).

12 B. The City shall, in due course, reimburse the Contractor for the
13 actual, allowable, reasonable and necessary costs and expenses incurred by
14 Contractor in the performance of this Contract which are authorized and approved
15 by Exhibit "B" and are in accordance with and pursuant to the Prime Contract, to the
16 extent that such Prime Contract is applicable to the Contractor's performance
17 hereunder.

18 C. Payment to the Contractor shall be limited to the amounts
19 specified in Exhibit "B" for the categories, criteria and rates established in said
20 Exhibit. The allocation of the total contract amount among the items in the Budget
21 may vary by as much as ten percent (10%) without the approval by Workforce
22 Investment Board's Executive Director ("Executive Director"). Additionally,
23 Contractor may, with the prior written approval of the Executive Director or his
24 designee, make adjustments within and among the categories of expenditures in
25 the Budget in excess of ten percent (10%), and modify the performance to be
26 rendered hereunder as provided in Exhibit "B"; provided, however, that any such
27 adjustment in expenditures shall not result in an increase in the amount of the total
28 contract. The agent or representative of Contractor who signs as the maker of

1 checks or drafts or in any manner authorizes the disbursement of said funds or
2 expenditure of same shall be covered by a blanket fidelity or comprehensive crime
3 bond regarding the handling of said funds in an amount set out in Section 13,
4 paragraph E of this Contract.

5 D. Contractor shall not charge nor receive compensation under
6 this Contract for any services or expenses unless said services or expenses are
7 directly and exclusively related to the purposes of this Contract, and provided that
8 payment is not also received by Contractor from some other source for said services
9 or expenses.

10 E. Disbursement of funds received from the State shall be under
11 the direction of the City Manager or his designee and shall be in accordance with
12 the provisions of this Contract and made pursuant to the Prime Contract and any
13 additional procedures, regulations and reporting requirements which are
14 established by the City that do not conflict with applicable procedures, regulations
15 and reporting requirements of the State.

16 F. All payments to Contractor by the City will be based upon
17 invoices and the necessary supporting documents which the State and the City may
18 require Contractor to submit. The expenditure of all funds shall be accounted for
19 promptly and submitted with the funded "Period of Availability" for the program year.
20 Reimbursement will not be made for claims generated beyond contract end date or
21 ninety (90) days after the contract end date for properly accrued expenditures.
22 Contractor shall keep separate detailed accounts for each expenditure for each
23 component part of this project.

24 G. Public or private non-profit contractor revenues in excess of
25 costs are considered program income or profits in accordance with Code of Federal
26 Regulations definition of "Income" pursuant to 29 CFR 97.32(2). When authorized,
27 program income may be added to the funds committed to the grant agreement. The
28 program income shall be used for the purposes and under the conditions of the grant

1 agreement or as amended unless the Governor of the State of California requires
2 that such income be turned over to the State.

3 6. RECORDS.

4 A. Records relating to the performance of this Contract shall be
5 kept and maintained by Contractor in accordance with the manner and method
6 prescribed by applicable State regulations and guidelines and City requirements,
7 and will be current, complete and available for purposes of inspection and audit
8 during business hours as deemed necessary upon request by representatives of
9 federal, state and local agencies.

10 B. Contractor shall provide access to all documents and materials
11 related to this Contract and shall provide any information that the City, or its
12 designee requires in order to monitor and evaluate Contractor's performance
13 hereunder. All such records shall be maintained and accessible for a period of
14 seven (7) years from the expiration or earlier termination of this Contract.

15 7. FINANCIAL REPORTS.

16 A. Contractor shall promptly distribute to the City Manager or his
17 designee copies of all correspondence including, but not limited to, financial,
18 operational and performance reports which Contractor submits to or receives from
19 the State. Contractor shall provide such other reports, documents or information as
20 may be requested or required by the City or the State within three (3) days of written
21 request. Upon expiration or earlier termination of this Contract, and within the time
22 and in the manner prescribed by the City, the Contractor shall perform all necessary
23 close-out procedures required by the State and the City, including preparation of
24 close-out reports and transmittal to the City of all documents in the possession of
25 Contractor which relate to the Conduct of the Program, within the time and in the
26 manner prescribed by the City. Final payment to the Contractor under this Contract
27 will be paid only after the City has determined that Contractor has satisfactorily
28 completed said close-out procedures.

1 B. If the Contractor is subject to the Single Audit Act (SAA), the
2 Contractor shall include this Contract within the scope of the SAA audit. A copy of
3 the SAA final audit report shall be delivered by Contractor to the City of Long Beach
4 within thirty (30) calendar days after its request and, in any event, no later than six
5 (6) months after the end of the then-current fiscal year of Contractor. In the event
6 the Contractor fails to comply with this requirement, the Contractor shall be liable
7 for any costs incurred by City for a substitute audit or review.

8 8. ACCOUNTING PROCEDURES.

9 A. On a monthly basis, commencing on the last day of the month
10 next succeeding the Effective Date of this Contract, the Contractor will submit an
11 invoice with supporting documentation for payment based upon the cost categories
12 in Exhibit "B". These invoices will be due by the tenth (10th) working day after the
13 end of each month. Contractor shall complete the monthly payment requests in the
14 format required by the City.

15 B. The Contractor will establish separate account numbers within
16 its accounting system to account for the expenditures and revenues of this Contract.
17 The Contractor's accounting system will be in compliance with all applicable
18 procedures and Federal and State authorities having jurisdiction over this Contract,
19 and shall be consistent with the fiscal and accounting procedures, including accruals
20 set forth herein. Without limiting the generality of the foregoing, the Contractor shall
21 adhere to the following fiscal and accounting procedures:

22 i. Maintain a bank account and perform monthly bank
23 reconciliations.

24 (a) Deposit all receipts in the bank account promptly
25 and intact.

26 (b) Do not pay any expense directly out of cash
27 receipts.

28 (c) Maintain bank validated copies for every deposit

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slip in chronological order. Each deposit slip should include sufficient detail to explain the source of the funds being deposited. (This may be done by recording the details on the deposit slip or by attached supporting documentation which may have been received with the receipts).

(d) Disburse all funds by check, preferably signed or approved electronically by two (2) employees, neither of whom is the bookkeeper or the accounting clerk.

ii. Designate specific employees to perform each of the following functions:

(a) Receipt for goods and services provided to Contractor.

(b) Approve the purchase of goods and services for Contractor.

(c) Approve employee time sheets.

(d) Each above function shall be designated to a different employee.

iii. Maintain documented support for every check written which should include:

(a) Original invoice from each vendor.

(b) Indication by signature and date of an authorized employee that the goods or services were received by the Contractor. This may be done on a separate receiving report, a copy of a packing slip or on the invoice itself.

(c) Indication that the goods or services were approved for purchase by an authorized individual. This should be by signature and date and should appear on the invoice or on the purchase order or purchase requisition, if such is used by the

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Contractor.

iv. Maintain a copy of each invoice submitted to the Operations Division with copies of all supporting documents.

v. Maintain the following records in an orderly fashion by grant period or Contractor's fiscal year:

- (a) Bank statements and bank reconciliations.
- (b) Deposit slips and supports.
- (c) Checks and supports.
- (d) Time sheets or documentation to verify

Contractor's labor costs.

- (e) Cash receipts and cash disbursement journals.
- (f) Requests for reimbursement and supports.
- (g) Financial statements.
- (h) Maintain and file all required tax and personnel

reports with appropriate agencies.

vi. Contractor must adhere to all audit requirements as outlined in Contractor's respective OMB Circular, 29 CFR 95, and 29 CFR Part 96, and A 133, 29 CFR 97.26 and 29 CFR 95.26 as applicable.

C. All invoices and billings will be considered final and must be submitted within forty-five (45) calendar days from the end of the Term. Resolution of disputed matters must be resubmitted within fifteen (15) calendar days from date mailed to Contractor. City, in its sole discretion, may elect not to pay any invoices or billings submitted after the cut-off date, or if funding is no longer available.

9. INDEPENDENT CONTRACTOR STATUS. It is distinctly understood that in the performance of this Contract, the Contractor shall at all times be considered a wholly independent contractor and that Contractor's obligations to and authority from the City are solely as are preserved by this Contract. Contractor expressly warrants that it will not, at any time, hold itself out or in any manner represent that Contractor or any of its

1 agents, volunteers, subscribers, members, officers or employees are in any manner the
2 officers, employees or agents of the City or the Pacific Gateway Workforce Investment
3 Network (Network), an unincorporated non-profit association. Contractor shall not have
4 any authority to bind the City or Network at any time or for any purpose. Contractor nor
5 any of Contractor's officers, employees or agents shall have any power or authority as
6 agents or employees of the City or Network and shall not be entitled to any of the rights,
7 privileges or benefits of a City or Network employee.

8 10. ASSIGNMENT AND SUBCONTRACTING. This Agreement
9 contemplates the personal services of Contractor and Contractor's employees, and the
10 parties acknowledge that a substantial inducement to City for entering this Agreement was
11 and is the professional reputation and competence of Contractor and Contractor's
12 employees. Contractor shall not assign its rights or delegate its duties under this
13 Agreement, or any interest in this Agreement, or any portion of it, without the prior approval
14 of City, except that Contractor may with the prior approval of the City Manager of City,
15 assign any moneys due or to become due the Contractor under this Agreement. Any
16 attempted assignment or delegation shall be void, and any assignee or delegate shall
17 acquire no right or interest by reason of an attempted assignment or delegation.
18 Furthermore, Contractor shall not subcontract any portion of its performance without the
19 prior approval of the City Manager or designee, or substitute an approved subconsultant
20 or contractor without approval prior to the substitution. Nothing stated in this Section shall
21 prevent Contractor from employing as many employees as Contractor deems necessary
22 for performance of this Agreement.

23 11. INDEMNITY.

24 A. Contractor shall indemnify, protect and hold harmless City, its
25 Boards, Commissions, and their officials, employees and agents ("Indemnified
26 Parties"), from and against any and all liability, claims, demands, damage, loss,
27 obligations, causes of action, proceedings, awards, fines, judgments, penalties,
28 costs and expenses, including attorneys' fees, court costs, expert and witness fees,

1 and other costs and fees of litigation, arising or alleged to have arisen, in whole or
2 in part, out of or in connection with (1) Contractor's breach or failure to comply with
3 any of its obligations contained in this Agreement, including any obligations arising
4 from the Project's compliance with or failure to comply with applicable laws, including all
5 applicable federal and state labor requirements including, without limitation, the
6 requirements of California Labor Code section 1770 *et seq.* or (2) negligent or willful acts,
7 errors, omissions or misrepresentations committed by Contractor, its officers,
8 employees, agents, subcontractors, or anyone under Contractor's control, in the
9 performance of work or services under this Agreement (collectively "Claims" or
10 individually "Claim").

11 B. In addition to Contractor's duty to indemnify, Contractor shall
12 have a separate and wholly independent duty to defend Indemnified Parties at
13 Contractor's expense by legal counsel approved by City, from and against all
14 Claims, and shall continue this defense until the Claims are resolved, whether by
15 settlement, judgment or otherwise. No finding or judgment of negligence, fault,
16 breach, or the like on the part of Contractor shall be required for the duty to defend
17 to arise. City shall notify Contractor of any Claim, shall tender the defense of the
18 Claim to Contractor, and shall assist Contractor, as may be reasonably requested,
19 in the defense.

20 C. If a court of competent jurisdiction determines that a Claim was
21 caused by the sole negligence or willful misconduct of Indemnified Parties,
22 Contractor's costs of defense and indemnity shall be (1) reimbursed in full if the
23 court determines sole negligence by the Indemnified Parties, or (2) reduced by the
24 percentage of willful misconduct attributed by the court to the Indemnified Parties.

25 D. The provisions of this Section shall survive the expiration or
26 termination of this Agreement.

27 12. EMPLOYMENT TRAINING ACT CLAUSES. Contractor shall
28 administer contract within the policies and procedures mandated by the Workforce

1 Investment Act of 1998, subsequently reauthorized as Workforce Innovation and
2 Opportunity Act, and the Network and agrees to comply with the following contract clauses,
3 as applicable, during the duration of the contract period:

- 4 A. Compliance with requirements and/or regulations related to
5 patent rights, copyrights, and rights in data;
- 6 B. Maintenance of records for 7 years;
- 7 C. The Equal Employment Opportunity Act provisions;
- 8 D. The Americans with Disabilities Act of 1990;
- 9 E. The Contract Work Hours and Safety Standards Act;
- 10 F. The Clean Air Act and Environmental Protection Agency
11 regulations;
- 12 G. The Energy Policy Conservation Act;
- 13 H. The Byrd Anti-Lobbying Amendment;
- 14 I. Veteran's Priority Provisions;
- 15 J. Whistle Blower Protection;
- 16 K. Buy American Requirements.

17 13. INSURANCE. Concurrent with the execution of this Contract by
18 Contractor, as a condition precedent to the effectiveness of this Contract, and in partial
19 performance of the obligations of indemnity assumed by Contractor under Section 11
20 above, Contractor shall procure and maintain during the Term at Contractor's expense:

21 A. Comprehensive General Liability in an amount not less than Two
22 Million Dollars (\$2,000,000.00) combined single limit for each occurrence or Four Million
23 Dollars (\$4,000,000.00) General Aggregate for bodily injury, personal injury and property
24 damage. The Indemnified Parties shall be covered as insureds in respect to liability arising
25 out of activities performed by or on behalf of the Contractor and coverage shall be in a form
26 acceptable to the Risk Manager of the City ("Risk Manager").

27 B. Automobile Liability in an amount not less than Five Hundred
28 Thousand Dollars (\$500,000.00) combined single limit per accident for bodily injury and

1 property damage covering owned, non-owned and hired vehicles.

2 C. Workers' Compensation as required by the Labor Code of the State of
3 California and Employers' Liability Insurance with limits of one Million Dollars
4 (\$1,000,000.00) per occurrence.

5 D. Accidental Medical, Death and Dismemberment Insurance for all
6 participants not entitled to workers' compensation benefits under the provisions of Section
7 3700 of the Labor Code of the State of California, unless this requirement has been waived
8 in writing by the Risk Manager. Said insurance shall have limits of not less than One
9 Hundred Thousand Dollars (\$100,000.00) Accident Medical and Twenty-Five Thousand
10 Dollars (\$25,000.00) Accidental Death and Dismemberment.

11 E. Blanket Honesty or Comprehensive Crime Bond in an amount of fifty
12 percent (50%) of sums payable under this Contract, or Twenty-Five Thousand Dollars
13 (\$25,000.00), whichever is higher, to safeguard the proper handling of funds by those
14 employee's agents or representatives of the Contractor who sign as the maker of checks
15 or drafts or in any manner authorize the disbursement or expenditure of said funds.

16 Each insurance policy shall be endorsed to provide that coverage shall not
17 be cancelled by either party, reduced in amount or in limits, except after thirty (30) days
18 prior written notice has been given to the City. All such insurance shall be primary and not
19 contributing to any other insurance or self-insurance maintained by the Indemnified Parties.

20 The insurance required hereunder shall be placed with carriers admitted to
21 write insurance in California, or carriers with a rating of or equivalent to A:VIII by A.M. Best
22 Company and may be subject to such self-insurance or deductible as may be approved by
23 the Risk Manager. Any Contractors which Contractor may use in the performance of
24 services under this Contract shall be required to maintain insurance in accordance with the
25 requirements here in Section 13.

26 Contractor shall furnish the City with certificates of insurance and with original
27 endorsements affecting coverage as required above. The certificates and endorsements
28 for each insurance policy shall be signed by a person authorized by that insurer to bind

1 coverage on its behalf. Policies written on a "claims made" basis shall provide for an
2 extended reporting period of not less than One Hundred Eighty (180) days. No claims
3 made policies shall be acceptable to City unless the City Manager determines that no
4 occurrence policy is available in the market for the particular risk being insured. Any
5 modification or waiver of the insurance requirements contained in this Contract shall only
6 be made with the written approval of the Risk Manager in accordance with established city
7 policy.

8 14. DRUG-FREE WORKPLACE. Contractor shall comply with
9 Government Code Sections 8350 et seq. and 29 CFR Part 98, in matters relating to
10 providing a drug-free workplace including, but not limited to, the following:

11 A. Publishing a statement notifying employees that unlawful
12 manufacture, distribution, dispensation, possession, or use of a controlled
13 substance is prohibited and specifying actions to be taken against employees for
14 violations, as required by Government Code Section 8355(a).

15 B. Establishing a Drug-Free Awareness Program as required by
16 Government Code Section 8355(b), to inform employees about all of the following:

- 17 i. The dangers of drug abuse in the workplace,
18 ii. The person's or organization's policy of maintaining a
19 drug-free workplace;
20 iii. Any available counseling, rehabilitation and employee
21 assistance programs, and
22 iv. Penalties that may be imposed upon employees for drug
23 abuse violations.

24 C. Ensuring that every employee who provides services under this
25 Contract:

- 26 i. Will receive a copy of Contractor's drug-free policy
27 statement, and
28 ii. Will agree to abide by the terms of Contractor's

1 statement as a condition of employment on this Contract:

2 D. Payments due Contractor may be subject to suspension or
3 termination for failure to carry out the requirements of Government Code Sections
4 8350 et seq. and 29 CFR Part 98, Debarment and Suspension; Drug Free
5 Workplace. As provided in Government Code Section 8357, the City shall not be
6 required to ensure that Contractor provides a drug-free workplace.

7 15. NONDISCRIMINATION.

8 A. In connection with performance of this Agreement and subject
9 to applicable rules and regulations, Contractor shall not discriminate against any
10 employee or applicant for employment because of race, religion, national origin,
11 color, age, sex, sexual orientation, gender identity, AIDS, HIV status, handicap, or
12 disability. Contractor shall ensure that applicants are employed, and that employees
13 are treated during their employment, without regard to these bases. These actions
14 shall include, but not be limited to, the following: employment, upgrading, demotion
15 or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay
16 or other forms of compensation, and selection for training, including apprenticeship.

17 B. It is the policy of City to encourage the participation of
18 Disadvantaged, Minority and Women-owned Business Enterprises in City's
19 procurement process, and Contractor agrees to use its best efforts to carry out this
20 policy in its use of subconsultants and contractors to the fullest extent consistent
21 with the efficient performance of this Agreement. Contractor may rely on written
22 representations by subconsultants and contractors regarding their status.
23 Contractor shall report to City in May and in December or, in the case of short-term
24 agreements, prior to invoicing for final payment, the names of all subconsultants
25 and contractors hired by Contractor for this Project and information on whether or
26 not they are a Disadvantaged, Minority or Women-Owned Business Enterprise, as
27 defined in Section 8 of the Small Business Act (15 U.S.C. Sec. 637).

28 16. EQUAL BENEFITS ORDINANCE. Unless otherwise exempted in

1 accordance with the provisions of the Ordinance, this Agreement is subject to the
2 applicable provisions of the Equal Benefits Ordinance (EBO), section 2.73 et seq. of the
3 Long Beach Municipal Code, as amended from time to time.

4 A. During the performance of this Agreement, the Contractor
5 certifies and represents that the Contractor will comply with the EBO. The
6 Contractor agrees to post the following statement in conspicuous places at its place
7 of business available to employees and applicants for employment:

8 "During the performance of a contract with the City of Long Beach, the
9 Contractor will provide equal benefits to employees with spouses and its employees
10 with domestic partners. Additional information about the City of Long Beach's Equal
11 Benefits Ordinance may be obtained from the City of Long Beach Business Services
12 Division at 562-570-6200."

13 B. The failure of the Contractor to comply with the EBO will be
14 deemed to be a material breach of the Agreement by the City.

15 C. If the Contractor fails to comply with the EBO, the City may
16 cancel, terminate or suspend the Agreement, in whole or in part, and monies due or
17 to become due under the Agreement may be retained by the City. The City may
18 also pursue any and all other remedies at law or in equity for any breach.

19 D. Failure to comply with the EBO may be used as evidence
20 against the Contractor in actions taken pursuant to the provisions of Long Beach
21 Municipal Code 2.93 et seq., Contractor Responsibility.

22 E. If the City determines that the Contractor has set up or used its
23 contracting entity for the purpose of evading the intent of the EBO, the City may
24 terminate the Agreement on behalf of the City. Violation of this provision may be
25 used as evidence against the Contractor in actions taken pursuant to the provisions
26 of Long Beach Municipal Code section 2.93 et seq., Contractor Responsibility.

27 17. CONFIDENTIALITY.

28 A. Contractor shall keep confidential all financial, operations, and

1 performance records relating to its performance of this Contract ("Data") and shall
2 not disclosed the Data or use the Data directly or indirectly other than in the course
3 of services provided hereunder. The obligation of confidentiality shall continue
4 following expiration or earlier termination of this Contract. In addition, Contractor
5 shall keep confidential all information, whether written or oral, or visual, obtained by
6 any means whatsoever in the course of Contractor's performance hereunder for the
7 same period of time. Contactor shall not disclose Data to any third party, nor use it
8 for Contractor's own benefit or the benefit of others without first obtaining the prior
9 written authorization and consent of the City.

10 B. All Data and other information, in whatever form or medium,
11 compiled or prepared by Contractor in performing its services or furnished to
12 Contractor by City shall be the property of City and City shall have the unrestricted
13 right to use or disseminate same without payment of further compensation to
14 Contractor. Copies of Contractor's work product may be retained by Contractor for
15 its own records.

16 18. BREACH OF CONFIDENTIALITY. Contractor shall not be liable for a
17 breach of confidentiality with respect to Data that:

18 A. Contractor demonstrates Contractor knew prior to the time City
19 disclosed it; or

20 B. Is or becomes publicly available without breach of this Contract
21 by Contractor; or

22 C. A third party who has a right to disclose such information does
23 so to Contractor without restrictions on further disclosure; or

24 D. Must be disclosed pursuant to subpoena, court order, state or
25 federal WIA rules and regulations, federal Department of Labor rules and
26 regulations, or the rules and regulations of any other governmental agency having
27 jurisdiction over WIA administration.

28 19. NOTICES. Any notice or approval required by this Agreement shall

1 be in writing and personally delivered or deposited in the U.S. Postal Service, first class,
2 postage prepaid, addressed to Consultant at the address first stated above, and to the City
3 at 333 West Ocean Boulevard, Long Beach, California 90802, Attn: City Manager with a
4 copy to the Pacific Gateway's Executive Director at 3447 Atlantic Avenue, Long Beach, CA
5 90806. Notice of change of address shall be given in the same manner as stated for other
6 notices. Notice shall be deemed given on the date deposited in the mail or on the date
7 personal delivery is made, whichever occurs first.

8 20. CONTRACT ADMINISTRATION. The City Manager, or designee, is
9 authorized and directed, for and on behalf of the City, to administer this Contract and all
10 related matters, and any decision of the City Manager, or his designee, in connection
11 herewith shall be final.

12 21. CORPORATE STATUS. If the Contractor is a corporation, Contractor
13 shall, as a condition precedent to the effectiveness of this Contract, submit to City proof of
14 good standing of the corporate status.

15 22. ENTIRE AGREEMENT. This document fully expresses all
16 understandings of the parties concerning all matters covered and shall constitute the total
17 Agreement. Except for the adjustments of Exhibit "B" as provided in Section 5 hereof, no
18 addition to or alteration of the terms of this Contract whether by written or oral
19 understanding of the parties, their officers, agents or employees shall be valid unless made
20 in writing and formally adopted in the same manner as this Contract.

21 23. CAPTIONS AND ORGANIZATION. The various headings and
22 numbers herein and the grouping of the provisions of this Contract into separate Sections,
23 paragraphs and clauses are for the purpose of convenience only and shall not be
24 considered a part hereof, and shall have no effect on the construction or interpretation of
25 any part of this contract.

26 24. TAX REPORTING. As required by federal and state law, City is
27 obligated to and will report the payment of compensation to Contractor on Form 1099-Misc.
28 Contractor shall be solely responsible for payment of all federal and state taxes resulting

1 from payments under this Agreement. Contractor shall submit Contractor's Employer
2 Identification Number (EIN), or Contractor's Social Security Number if Contractor does not
3 have an EIN, in writing to City's Accounts Payable, Department of Financial Management.
4 Contractor acknowledges and agrees that City has no obligation to pay Contractor until
5 Contractor provides one of these numbers.

6 25. AUTHORIZATION TO EXECUTE. Contractor warrants and affirms to
7 City that any and all persons signing this Contract are authorized and empowered to so
8 sign and that the execution of this Contract by such person or persons does bind Contractor
9 to all terms, covenants and conditions of this Contract.

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1 IN WITNESS WHEREOF, the parties hereto have caused these presents to
2 be duly executed with all the formalities required by law on the respective dates set forth
3 opposite their signatures.

4 PERFORMANCE EXCELLENCE
5 PARTNERS, LLC, a Delaware limited
6 liability company

7 8/29, 2017

8 By Rachel E. Ramirez
9 Name Rachel E. Ramirez
10 Title President & CEO

11 8/29, 2017

12 By Jami Simon
13 Name Jami Simon
14 Title Director of Operations

15 "Contractor"

16 CITY OF LONG BEACH, a municipal
17 corporation

18 Sept. 11, 2017

19 By Tom Modica EXECUTED PURSUANT
20 TO SECTION 301 OF
21 THE CITY CHARTER.
22 ~~City Manager~~
23 Assistant City Manager

24 "City"

25 This Contract is approved as to form on Sept 5, 2017.

26 CHARLES PARKIN, City Attorney

27 By Charles Parkin
28 Deputy

OFFICE OF THE CITY ATTORNEY
CHARLES PARKIN, City Attorney
333 West Ocean Boulevard, 11th Floor
Long Beach, CA 90802-4664

EXHIBIT A

WIOA SUBGRANT AGREEMENT

City of Long Beach dba Pacific Gateway

SUBGRANT NO: K7102038
MODIFICATION NO: 1
SUBRECIPIENT CODE: LBC
UNIQUE ENTITY NO: 557398141

PASS-THROUGH ENTITY:

State of California
Employment Development Dept.
Central Office Workforce
Services Division
P.O.Box 826880, MIC 69
Sacramento, CA 94280-0001

SUBRECIPIENT: City of Long Beach dba Pacific Gateway
3447 ATLANTIC AVENUE
LONG BEACH, CA 90807

GOVERNMENTAL
ENTITY: Yes

This Subgrant Agreement is entered into by and between the State of California, Employment Development Department, hereinafter the Pass-through Entity, and the City of Long Beach dba Pacific Gateway, hereinafter the Subrecipient. The Subrecipient agrees to operate a program in accordance with the provisions of this Subgrant and to have an approved Workforce Innovation and Opportunity Act (WIOA) Local Plan for the above named Pass-through Entity filed with the Pass-through Entity pursuant to the WIOA. This modification consists of this sheet and those of the following exhibits, which are attached hereto and by this reference made a part hereof:

- Funding Detail Chart
- Rapid Response Layoff Aversion
- Rapid Response by Formula
- Dislocated Worker Rd 1
- Adult Formula RD 1

ALLOCATION(s)

The Pass-through Entity agrees to reimburse the Subrecipient not to exceed the amount listed hereinafter 'TOTAL'

PRIOR AMOUNT	\$2,018,168.00
INCREASE/DECREASE:	\$539,119.00
TOTAL:	\$2,557,287.00

TERM OF AGREEMENT

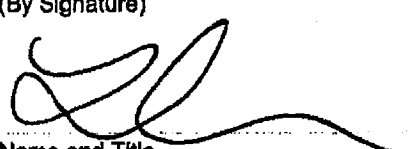
From: 4/1/2016 To: 6/30/2018

Terms of Exhibits are as designated on each exhibit

PURPOSE: To add first round formula funds in grant codes 201, 501, 540 and 292.

APPROVED FOR PASS-THROUGH ENTITY(EDD)
(By Signature)

APPROVED FOR SUBRECIPIENT (By Signature)
Unilateral modification. Subrecipient Signature not required


Name and Title
JOSÉ LUIS MÁRQUEZ
CHIEF
CENTRAL OFFICE WORKFORCE SERVICES
DIVISION

Name and Title

I hereby certify that to my knowledge, the budgeted funds are available for the period and purpose of expenditures as stated herein

This agreement does not fall within the meaning of Section 10295 of Chapter 2 of Part 2 of Division 2 of the Public Contract Code of the State of California and pursuant to 58 OPS Cal. Atty. Gen 586, is exempt from review or approval of the Dept. of General Services and the Dept. of Finance


Signature of EDD Accounting Officer


Signature of EDD Contract Officer

Budget Item: 7100	Fund: 0689	Budgetary Attachment: No
Chapter:	Subline:	FY: ***

SUBGRANT AGREEMENT
FUNDING DETAIL SHEET

SUBGRANT NO: K7102038
MODIFICATION NO: 1

City of Long Beach dba Pacific Gateway

I. Allocation

Funding Source	Prior Amount	Increase	Decrease	Adjusted Allocation
WIA/WIOA 25% - Dislocated Worker Rapid Response				
96217 292 Rapid Response Layoff Aversion 07/01/2016 to 06/30/2017 Prog/Element 61/70 Ref 001 Fed Catg 17.278	\$0.00	\$22,317.00	\$0.00	\$22,317.00
96217 540 Rapid Response by Formula 07/01/2016 to 06/30/2017 Prog/Element 61/70 Ref 001 Fed Catg 17.278	\$0.00	\$78,791.00	\$0.00	\$78,791.00
Total WIA/WIOA 25% - Dislocated Worker Rapid Response	\$0.00	\$101,108.00	\$0.00	\$101,108.00
WIA/WIOA Formula				
96157 201 Adult Formula RD 1 07/01/2016 to 06/30/2018 Prog/Element 61/90 Ref 101 Fed Catg 17.258	\$0.00	\$235,112.00	\$0.00	\$235,112.00
96107 301 Youth Formula Rd 1 04/01/2016 to 06/30/2018 Prog/Element 61/90 Ref 101 Fed Catg 17.259	\$2,018,168.00	\$0.00	\$0.00	\$2,018,168.00
96207 501 Dislocated Worker Rd 1 07/01/2016 to 06/30/2018 Prog/Element 61/90 Ref 101 Fed Catg 17.278	\$0.00	\$202,899.00	\$0.00	\$202,899.00
Total WIA/WIOA Formula	\$2,018,168.00	\$438,011.00	\$0.00	\$2,456,179.00
Grand Total:	\$2,018,168.00	\$539,119.00	\$0.00	\$2,557,287.00

NARRATIVE

**SUBGRANT NO:K7102038
MODIFICATION NO: 1**

**SUBRECIPIENT:City of Long Beach dba Pacific Gateway
FAIN NO: AA-28305-16-55-A-6
FEDERAL AWARD DATE: 7/22/2016
FUNDING SOURCE: Adult Formula RD 1 - 201**

TERM OF THESE FUNDS: 07/01/2016 - 06/30/2018

Use of funds added by this modification is limited to this period and additionally limited by the recapture provisions applicable to this funding source. The state may at its discretion recapture funds obligated under this exhibit, if expenditure plans are not being met.

PROGRAM NARRATIVE

Workforce Innovation and Opportunity Act (WIOA) Adult Formula funds are being incorporated into the Program Year (PY) 2016-17 Subgrant Agreement to support the WIOA Adult Program. The funds in grant code 201 consist of 1st round funding and are available for expenditure from July 1, 2016 through June 30, 2018.

This exhibit adds to and does not replace the terms and conditions of any other exhibit included in this agreement which terms and conditions remain in full force and effect.

WIOA (2015)

NARRATIVE

SUBGRANT NO:K7102038
MODIFICATION NO: 1

SUBRECIPIENT:City of Long Beach dba Pacific Gateway
FAIN NO: AA-28305-16-55-A-6
FEDERAL AWARD DATE: 7/22/2016
FUNDING SOURCE: Dislocated Worker Rd 1 - 501

TERM OF THESE FUNDS: 07/01/2016 - 06/30/2018

Use of funds added by this modification is limited to this period and additionally limited by the recapture provisions applicable to this funding source. The state may at its discretion recapture funds obligated under this exhibit, if expenditure plans are not being met.

PROGRAM NARRATIVE

Workforce Innovation and Opportunity Act (WIOA) Dislocated Worker Formula funds are being incorporated into the Program Year (PY) 2016-17 Subgrant Agreement to support the WIOA Dislocated Worker Program. The funds in grant code 501 consist of 1st round funding and are available for expenditures from July 1, 2016 through June 30, 2018.

This exhibit adds to and does not replace the terms and conditions of any other exhibit included in this agreement which terms and conditions remain in full force and effect.

WIOA (2015)

NARRATIVE

SUBGRANT NO:K7102038
MODIFICATION NO: 1

SUBRECIPIENT:City of Long Beach dba Pacific Gateway
FAIN NO: AA-28305-16-55-A-6
FEDERAL AWARD DATE: 7/22/2016
FUNDING SOURCE: Rapid Response by Formula - 540

TERM OF THESE FUNDS: 07/01/2016 - 06/30/2017

Use of funds added by this modification is limited to this period and additionally limited by the recapture provisions applicable to this funding source. The state may at its discretion recapture funds obligated under this exhibit, if expenditure plans are not being met.

PROGRAM NARRATIVE

These Workforce Innovation and Opportunity Act (WIOA) 25 percent Rapid Response (RR) funds are being incorporated into your Program Year (PY) 2016-17 Subgrant Agreement to support the WIOA Dislocated Worker Program. The funds in grant code 540 consist of 1st round funding and are available for expenditures from July 1, 2016 to June 30, 2017. These "formula based" Rapid Response funds (see WSIN15-51) must be used for the cost of required and allowable Rapid Response activities in response to layoffs, business closures, and natural disasters.

This exhibit adds to and does not replace the terms and conditions of any other exhibit included in this agreement which terms and conditions remain in full force and effect.

WIOA (2015)

NARRATIVE

**SUBGRANT NO:K7102038
MODIFICATION NO: 1**

**SUBRECIPIENT:City of Long Beach dba Pacific Gateway
FAIN NO: AA-28305-16-55-A-6
FEDERAL AWARD DATE: 7/22/2016
FUNDING SOURCE: Rapid Response Layoff Aversion - 292**

TERM OF THESE FUNDS: 07/01/2016 - 06/30/2017

Use of funds added by this modification is limited to this period and additionally limited by the recapture provisions applicable to this funding source. The state may at its discretion recapture funds obligated under this exhibit, if expenditure plans are not being met.

PROGRAM NARRATIVE

Layoff Aversion funds are being incorporated into the Program Year (PY) 2016-17 Subgrant Agreement to support the Layoff Aversion Program. These funds will support local areas through a high performing Rapid Response strategy, which will emphasize coordinated efforts to avert layoffs in the effort to save jobs. The term of these funds are from July 1, 2016 to June 30, 2017.

This exhibit adds to and does not replace the terms and conditions of any other exhibit included in this agreement which terms and conditions remain in full force and effect.

WIOA (2015)

EXHIBIT B



PERFORMANCE EXCELLENCE PARTNERS, LLC
Response to the City of Long Beach RFP No. EP17-051
for Workforce Development Services / Subject Matter Experts



City of Long Beach
Purchasing Division
333 West Ocean Boulevard, 7th Floor
Long Beach, CA 90802

City of Long Beach
Request For Proposals Number EP17-051
For
WORKFORCE DEVELOPMENT SERVICES /
SUBJECT MATTER EXPERTS

Release Date:	02/14/2017
Questions Due to the City:	02/22/2017
Posting of the Q & A:	03/06/2017
Due Date:	03/14/2017

City Contact: Sokunthea Kol Buyer 562-570-6123

See Section 4 for instructions on submitting proposals.

Company Name Performance Excellence Partners, LLC Contact Person Rachel E. Ramirez

Address 7911 Professional Circle City Huntington Beach State CA Zip 92648

Telephone (714) 374-1140 Fax (714) 374-1120 Federal Tax ID No. [REDACTED]

E-mail: rramirez@performexcel.com

Prices contained in this proposal are subject to acceptance within 180 calendar days.

I have read, understand, and agree to all terms and conditions herein. Date March 14, 2017

Signed *Rachel E. Ramirez*

Print Name & Title Rachel E. Ramirez President & CEO

Rev 2016 0919



PERFORMANCE
EXCELLENCE
PARTNERS

7911 Professional Circle | Huntington Beach, CA 92648
714-374-1140 (phone) | 714-374-1120 (fax) | www.PerformExcel.com

March 14, 2017

City of Long Beach
Attn: Sokunthea Kol
333 W. Ocean Blvd., Plaza Level
Long Beach, CA 90802

Performance Excellence Partners, LLC (PEP) is pleased to submit this response to the Request for Proposals to provide Workforce Development Services / Subject Matter Experts (RFP# EP17-051) for the City of Long Beach. PEP has a track record of success in supporting public agencies with Workforce Development services, including organizations from the Cities of Long Beach, Los Angeles, and Santa Ana, as well as federal agencies including the U.S. Departments of Labor, Health and Human Services, and Education.

PEP is proposing a team of experienced and talented workforce development specialists that will provide the City of Long Beach and Pacific Gateway with services that will ensure a high quality of support for the Workforce Investment Board (WIB), America's Job Centers, for those individuals seeking employment, and the employers who are in need of qualified workers.

PEP is a certified Women-Owned Small Business (WOSB). PEP's DUNS is 062756759.

On behalf of PEP, I want to thank you for this opportunity to partner with the City of Long Beach.

Sincerely,

Rachel E. Ramirez
President & CEO
Performance Excellence Partners, LLC

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APPENDIX A: NARRATIVE / TECHNICAL PROPOSAL

To assist the City of Long Beach, Pacific Gateway in increasing job seeker and employer satisfaction, the PEP Team will provide our outstanding experience and expertise in the area of the Workforce Innovation and Opportunity Act (WIOA) programs and services. PEP has a proven track record with local Workforce Investment Boards, including Pacific Gateway, as well as national WIOA programs with the U.S. Department of Labor (DOL), Employment and Training Administration (ETA). Pacific Gateway will benefit from our over 17-year track record of success in supporting workforce investment. Starting with the transition from the Job Training Partnership Act (JTPA), PEP was an important contributor to the development of workforce investment and innovation. PEP's work began with support to the Enterprise and Workforce Enterprise Network initiatives, and PEP has played a continual role with WIOA programs including providing services and technical assistance to the DOL National Office, WIBs, One-Stop Centers, and grant recipients for a variety of WIOA-funded programs.

PEP is applying for the following Service Categories (RFP 3.5):

- Media and Graphic Design Consultants (RFP 3.5.3)*
- Quality Assurance Consultants (Continuous Improvement Practices) (RFP 3.5.4)*
- Grant Writing/Project Development Consultants (RFP 3.5.5)*
- Workforce Intermediary (RFP 3.5.6)*
- Asset Mapping Board/System Development, Innovation and Measurement (RFP 3.5.9)*
- Project Management (RFP 3.5.10)*
- One-Stop Operator – America's Job Centers of California (RFP 3.5.11)*

✓ **Media and Graphic Design Consultants (RFP 3.5.3)**

Demonstrated Competence

PEP will assist in maximizing Pacific Gateway's existing and future marketing efforts. PEP has delivered high-quality marketing strategies, tactics and materials for a variety of public agencies, such as Pacific Gateway, within the workforce development system. PEP brings a diverse portfolio in developing strategic communication plans and a depth of experience in developing and delivering market research and analysis, outreach campaigns and promotional materials. PEP will align its efforts with your media design strategy.

PEP will provide services to Pacific Gateway to develop and implement necessary media materials, including photography, video production, graphic design, and illustration, as well as other media as services as appropriate. Our services will enhance the outcomes to its target audiences, which may include job seekers, businesses, education and training partners and other key stakeholders. PEP will work in close collaboration with Pacific Gateway's key marketing and media staff to develop materials that will engage employers to partner with Pacific Gateway in providing employment services and inform job seekers of available job opportunities and training.

With our years of project-related experience in strategic communications and marketing, our team will create and implement Pacific Gateway's vision to create informational literature, brochures, newsletters, press releases, publications, annual reports, web-based communications, advertisements, public service announcements, signage, and more. PEP will partner with you to select and implement the appropriate media, including print materials, radio, website, social media, video, and more.

Experience in Performance of Comparable Engagements

Our previous performance experience and proven capabilities in this area include:

- 1. Pacific Gateway:** Since 2007, PEP has provided consulting, marketing, outreach and technical support services to Pacific Gateway to develop several marketing and outreach efforts to promote Pacific Gateway's Business Outreach Youth Opportunity/Hire-a-Youth campaign. This campaign was an extensive outdoor marketing campaign featuring signage, posters, postcards, marquee messaging and banner advertisements on buses, bus stops and billboards. In addition, PEP also provided project management support to develop Pacific Gateway's annual reports and Enterprise Zone Marketing Campaign.
- 2. Santa Ana Workforce Investment Board (WIB):** Over the span of several years, PEP provided marketing support to the Santa Ana WIB, developing the organization's branding through key communication messages as illustrated in marketing pieces developed by PEP's team of copywriters and graphic designers. This brand was disseminated through the Santa Ana WIB and Work Center logos, website, annual reports, posters, signs, brochures, postcards, and fact sheets. Marketing materials were translated into Spanish and Vietnamese, with capabilities to translate in other languages such as Tagalog, Khmer and

others. PEP also provided project management support in developing the City of Santa Ana's Federal Empowerment Zone 10-Year Report, and other annual reports.

- 3. Brevard Workforce Development Board:** In cooperation with Brevard Workforce, PEP facilitated a strategic outreach marketing effort to more than 300 non-profit organizations to engage them in a day-long training event. The goal was creating community Job Clubs to assist in serving 32,000 unemployed workers on Florida's Space Coast. PEP applied our knowledge of the public workforce system and our network of subject matter experts to provide a core of nationally known subject matter experts. Respecting the client's brand and applying marketing techniques for specific demographics, PEP provided strategic marketing oversight to assist the client in realizing a 40 percent response rate and a 20 percent participation rate.

Expertise and Availability of Key Personnel

Proposed Project Manager II (Key Personnel): Linda Metchikoff-Hooker brings over 23 years of experience in workforce development projects, project management, leadership development, instructional design and training, technical assistance, information technology and quality assurance solutions. Ms. Metchikoff-Hooker has led high performing teams on Federal- and local-level government contracts. She is able to quickly review project requirements, develop project plans and timelines, and identify resources, milestones, possible risks, and measures of success while, at the same time, fostering a team environment focused on excellence and exceeding client expectations. Examples include the successful project management services for Pacific Gateway's Business Outreach Youth Opportunity/Hire-a-Youth campaign and for Pacific Gateway's Enterprise Zone Marketing Campaign. For the Marketing Campaign, she led a team providing training and technical assistance services including conference planning, virtual roundtables, content development, webinars, website design, and social media. See Ms. Metchikoff-Hooker's resume in OTHER ATTACHMENTS for more information.

Proposed Graphics Specialist (Key Personnel): Kathy Cullen has over 20 years of experience in the graphics design and publication industry. Kathy has developed a reputation for her impeccable attention to detail, standard of excellence and ability to meet tight deadlines. Her expertise can be found in her appealing layouts and graphics for print materials including reports, brochures, newsletters, fact sheets, posters, presentations, and marketing and outreach materials. Her work includes a cover design and page layout for the U.S. Army Corps of Engineers Annual Financial Report and seven annual reports for the National Institute of Standards and Technology; logo designs and accompanying materials for U.S. Department of Agriculture's Research's 'Energy Science & Education' workshop; a 20 ft. exhibit for the U.S. Department of Energy's Office of Fossil Energy; several layout options for U.S. Health and Human Services, Health Profession Opportunity Grants Community Website; and preparing a wide variety of graphics for use in Environmental Impact Statements, Environmental Assessments, Base Closure Studies and other documents for the U.S. Department of Defense and Environmental Protection Agency clients. See Ms. Cullen's resume in OTHER ATTACHMENTS for more information.

Proposed Project Analyst (Key Personnel): Carrie Thorne has over 10 years of experience in project management, training and development, and business operations. Carrie currently supports PEP in workforce development and grantee technical assistance projects, as well as analyzing internal business development opportunities, by gathering and analyzing information, generating document deliverables, and presenting data to PEP staff and customers to facilitate key decisions and actions. This includes analysis and generation of data and deliverables in MS Word, Excel, and PowerPoint, often taking the form of data sets, graphs and tables, briefings, reports, and presentations. In her time with Southern California Edison, she managed and implemented several enterprise-wide employee training and development programs and provided project management in support of enterprise change management efforts. Carrie will support a range of project tasks and analyses for PEP staff serving Pacific Gateway. See Ms. Thorne's resume in OTHER ATTACHMENTS for more information.

Proposed Administrative/Clerical I (Non-Key Personnel): PEP offers capable and experienced administrative support professionals through its corporate operation, with headquarters located in Huntington Beach, CA. They will provide administrative support to PEP project staff, as appropriate, including, but not limited to material production, photocopying, document generation and editing, meeting coordination, information gathering, and more.

The proposed Project Manager II, Project Analyst, and Administrative/Clerical I staff are local to the Long Beach area; all PEP staff are available to support the work expressed in this proposal.

Quality Assurance Consultants (Continuous Improvement Practices) (RFP 3.5.4)

Demonstrated Competence

PEP has proven experience in delivering Quality Assurance (QA) expertise, applying continuous improvement strategies by assessing customer satisfaction and feedback, and implementing performance excellence techniques to improve systems and processes that will effect profound changes in organizational development. PEP was founded on the Malcolm Baldrige principles of performance excellence, sponsored by the Department of Commerce's National Institute of Standards and Technology. PEP staff members are trained Baldrige examiners and have evaluated a variety of public and private sector organizations to assess and improve work systems and performance. We draw upon our experience using the Baldrige criteria as a framework for QA, continuous improvement strategies and performance excellence. In addition, PEP utilizes a formal, uniform system for tracking and controlling task activities and for measuring performance across all task assignments. Specifically, PEP uses a balanced scorecard approach for managing workflow process and task fulfillment for its clients. Ultimately, PEP's QA methods help our customers perform more effectively, so that requirements and goals for a service delivery are met.

PEP welcomes the opportunity to assist Pacific Gateway in achieving the highest level of organizational performance, which requires a well-executed management approach and system capable of driving performance improvement by managing the interdependent relationships amongst management, labor, customers, stakeholders, partners, and suppliers. PEP has worked with a variety of public sector organizations implementing quality and continuous improvement programs to help our clients respond to challenges and address the complexities of delivering results.

Experience in Performance of Comparable Engagements

Continuous Improvement Expertise: PEP has helped government organizations develop a holistic approach to the management of their programs, initiatives and outreach efforts with a comprehensive quality assessment process and implementation model. PEP helps organizations effectively listen to their customers, design products and services that meet or exceed expectations, and continuously improve the processes that lead to achieving program goals and objectives.

PEP has extensive experience in delivering a diverse range of project management services focused on organizational development and continuous improvement in the workforce development community to help our clients develop, manage, and improve their programs and services. Our previous experience and proven capability in Continuous Improvement includes:

- 1. Pacific Gateway Workforce Investment Board:** On behalf of Pacific Gateway, PEP designed and conducted their 2010 and 2011 Customer Satisfaction surveys as part of their continuous improvement goals and objectives. PEP developed the survey instrument using the American Customer Satisfaction Index (ACSI) methodology to benchmark Pacific Gateway's customer satisfaction results against a wide range of public and private

industries and sectors. PEP staff disseminated the survey through email invitations and phone interviews to both job seekers and business customers who utilized Pacific Gateway's services through one of their service locations. Our team then analyzed the data, presented results to the WIB board, and provided recommendations for continuous improvement to improve Pacific Gateway's One-Stop Center services to ensure maximum impact on future customer experiences.

Performance Excellence Expertise: PEP uses the Baldrige criteria as a quality assurance framework for evaluating and improving organizational performance. The Baldrige framework includes seven inter-related categories: (1) Leadership; (2) Strategic Planning; (3) Customer and Market Focus; (4) Measurement, Analysis, and Knowledge Management; (5) Workforce Focus; (6) Operation Focus; and (7) Results. Our Team has also provided strategic counsel and subject matter expertise in the application process with the California Council for Excellence. Our previous experience and proven capabilities in this area include:

- 1. Hollywood WorkSource Center, Managed Career Solutions (MCS):** In 2013, PEP served as quality assurance consultants by providing project management services to complete and submit MSC's robust 50-page CAPE Eureka application using Baldrige criteria for performance excellence. The result was the coveted Eureka "Silver" award.
- 2. Pacific Gateway, Harbor WorkSource Center (Harbor):** PEP assisted the Harbor WorkSource Center (Harbor) with their participation in the California Awards for Performance Excellence (CAPE™) program. The Harbor is a City of Los Angeles funded employment and training program operated by Pacific Gateway. CAPE is a State awards program supported by the California Council for Excellence (CCE), a non-profit educational foundation focused on helping private and public sector organizations achieve world-class results through the principles and criteria of the Malcolm Baldrige Award for Performance Excellence. PEP provided Harbor with subject matter expert consulting and assistance with the quality data analysis; content development; review, final draft production, and submission of their Prospector application. Harbor won CAPE's coveted Prospector award and was recognized at the annual CCE conference.
- 3. Housing Authority of the City of Los Angeles (HACLA):** In the same year, PEP also assisted the Housing Authority of the City of Los Angeles (HACLA) with their participation in the California Awards for Performance Excellence (CAPE™) program. PEP provided HACLA with subject matter expert consulting and assistance with the quality data analysis; content development; review, final draft production, and submission of their Prospector application. HACLA also won CAPE's coveted Prospector award and was recognized at the same CCE conference.

Quality Assurance Expertise: As a quality-based organization, PEP understands the critical function of program oversight, monitoring and evaluation to guarantee that the finished product or service meets the highest standards of quality. PEP will provide leadership to assist Pacific Gateway in identifying solutions that will improve program oversight, the processes used

to deliver its workforce development programs, and the quality of the products and services delivered. Our previous experience and proven capability in this area include:

- 1. Department of Energy, Strategic Petroleum Reserve Project Management Office:** PEP provided project management, technical support services and quality assurance support services to the Department of Energy, Strategic Petroleum Reserve (SPR), Project Management Office (PMO). PEP established quality-based processes and executed tasks such as financial and management analysis, budget formulation and execution support, project reports, cost and schedule controls, integration of appraisal and audit information, audit of SPR's oil inventory and commercial leases, analysis of scheduling and documentation, analysis of configuration management systems, integration and documentation of security and emergency program procedures, mail and word processing, reproduction, graphics, records management, acquisition and sales support, personnel clearance support, analysis and integration of special studies, IT implementation of SPR Information Technology Long Range Plan, and Environment Safety and Health support.
- 2. National Personal Protection Technology Laboratory:** PEP provided business systems support services to the Department of Health and Human Services National Institute for Occupational Safety and Health (NIOSH) to implement the Baldrige Criteria for Performance Excellence as a framework for quality assurance in improving business systems and delivery. PEP associates used a *systematic management approach* for managing workflow processes and ensuring program integration. This technical approach has served to ensure that contract resources and processes are effectively aligned on the accomplishment of project goals and objectives. This strategic management approach continues to facilitate the alignment of contract resources and measurement of results from three interrelated standpoints: (1) management effectiveness; (2) quality of products; and (3) product delivery schedule.

Expertise and Availability of Key Personnel

Proposed Project Manager II (Key Personnel): Linda Metchikoff-Hooker brings over 23 years' experience in workforce development projects, project management, leadership development, instructional design and training, technical assistance, information technology and quality assurance solutions. Ms. Metchikoff-Hooker has led high performing teams on Federal- and local-level government contracts. She is able to quickly review project requirements, develop project plans and timelines, and identify resources, milestones, possible risks, and measures of success while, at the same time, fostering a team environment focused on excellence and exceeding client expectations. Examples include the successful deployment for the Pacific Gateway WIB of the annual American Customer Satisfaction Index (ACSI) survey via email and phone interviews to job seekers and business services clients, the analysis of data and the presentation of results; the hiring and management of technical grant reviewers for the Youth and Adult Services proposals evaluation process on behalf of the Oakland Workforce Investment Board (WIB); and leading a team providing training and technical assistance services including conference planning, virtual roundtables, content development, webinars, and website design including social media. As a certified Baldrige examiner with the California

Council for Excellence, she has provided project management services to help organizations, such as Hollywood WorkSource Center, Managed Career Solutions (MCS) complete and submit a robust 50-page application CAPE Eureka application using Baldrige criteria for performance excellence and uses the seven categories for performance excellence to engage her internal and external customers in continuous improvement strategies. See Ms. Metchikoff-Hooker's resume in OTHER ATTACHMENTS for more information.

Proposed Researcher/Writer I (Key Personnel): Tanya Alvarez Khorram has over 17 years of professional experience in workforce development. Her experience includes managing the Community Career Development, Inc.'s workforce development grants; working with the Wells Fargo Bank Hire LA Youth Internship Program; and the California Council for Excellence (CCE) as a lead trainer for the California Awards for Performance Excellence (CAPE) examiners. She has conducted numerous training and webinar workshops for potential and current CCE examiners. Ms. Khorram has managed city, state and federally funded workforce development grants. Her experience helped PEP to prepare a robust 50-page CAPE Eureka application based on the Baldrige criteria for performance excellence on behalf of the Hollywood WorkSource Center, Managed Career Solutions (MCS), resulting in the coveted Eureka "Silver" award. See Ms. Khorram's resume in OTHER ATTACHMENTS for more information.

Proposed Project Analyst (Key Personnel): Carrie Thorne has over 10 years of experience in project management, training and development, and business operations. Carrie currently supports PEP in workforce development and grantee technical assistance projects, as well as analyzing internal business development opportunities, by gathering and analyzing information, generating document deliverables, and presenting data to PEP staff and customers to facilitate key decisions and actions. This includes analysis and generation of data and deliverables in MS Word, Excel, and PowerPoint, often taking the form of data sets, graphs and tables, briefings, reports, and presentations. In her time with Southern California Edison, she managed and implemented several enterprise-wide employee training and development programs and provided project management in support of enterprise change management efforts. Carrie will support a range of project tasks and analyses for PEP staff serving Pacific Gateway. See Ms. Thorne's resume in OTHER ATTACHMENTS for more information.

Proposed Administrative/Clerical I (Non-Key Personnel): PEP offers capable and experienced administrative support professionals through its corporate operation, with headquarters located in Huntington Beach, CA. They will provide administrative support to PEP project staff, as appropriate, including, but not limited to material production, photocopying, document generation and editing, meeting coordination, information gathering, and more.

The proposed Project Manager II, Researcher/Writer I, Project Analyst are, and Administrative/Clerical I are local to the Long Beach area; all PEP staff are available to support the work expressed in this proposal.

Grant Writing/Project Development Consultants (RPF 3.5.5)

Demonstrated Competence

PEP's workforce development expertise enables us to quickly analyze the intended audience and the purpose for the proposal, gather relevant information, write, format, revise, edit proof and submit successful proposals. PEP will partner with Pacific Gateway to ensure grant-writing services support completion of application process for funding provided by an institution such as government agency, corporation or foundation. Successful grant writing requires a clear and thorough understanding of the grant's intent, target audience and funding agency; PEP offers the expertise and experience to support Pacific Gateway in achieving this success. PEP has successfully supported several customers in grant writing-related initiatives, including the City of Long Beach, Pacific Gateway and City of Los Angeles, Housing Authority.

Experience in Performance of Comparable Engagements

Our previous experience and proven capabilities in this area include:

- 1. Pacific Gateway:** PEP provided project management services to Pacific Gateway to ensure the submission of a robust technical response for the 2014 "H-1B Ready to Work Partnership" (SGA-DFA PY 13-07) discretionary grant opportunity with the U.S. Department of Labor (DOL), Employment and Training Administration (ETA). This grant opportunity provided long-term unemployed workers with individualized counseling, training and supportive and specialized services leading to rapid reemployment in occupations and industries for which employers use H-1B visas to hire foreign workers. With an overall award value of \$150 million, 20-30 grants were intended to be awarded, ranging between \$3 million to \$10 million. Project management services included project oversight, initiating, planning and executing project processes, research and data gathering, partnership collaboration, budget analysis, training, team building, pre-submission assessment, compliance, submission of grant application and follow up.
- 2. Housing Authority of the City of Los Angeles (HACLA):** PEP provided project management services to facilitate the process of gathering resources, materials and other related information to develop two WorkSource Center grant proposals for two HACLA Housing Development sites: 1) Pueblo del Rio and 2) 515 Columbia Avenue/William Mead Homes. PEP developed all documents by conducting research, reviewing documents, incorporating program subcontractor and HACLA staff input, refining and editing the narrative reports for 1) Demonstrated Ability and 2) Program Design. PEP worked with HACLA staff in obtaining data, documents and other program details to ensure a steady flow of drafted and final materials to be reviewed by HACLA's Grants Manager for final approvals and signatures.

Expertise and Availability of Key Personnel

Proposed Project Manager II (Key Personnel): Linda Metchikoff-Hooker brings over 23 years' experience in workforce development projects, project management, leadership development, instructional design and training, technical assistance, information technology and quality

assurance solutions. Ms. Metchikoff-Hooker has led high performing teams on Federal- and local-level government contracts. She is able to quickly review project requirements, develop project plans and timelines, and identify resources, milestones, possible risks, and measures of success while, at the same time, fostering a team environment focused on excellence and exceeding client expectations. Examples include project management services to Pacific Gateway to ensure the submission of a robust technical response for the 2014 "H-1B Ready to Work Partnership" (SGA-DFA PY 13-07) discretionary grant opportunity with the U.S. Department of Labor (DOL), Employment and Training Administration (ETA). Project management services included project oversight, initiating, planning and executing project processes, research and data gathering, partnership collaboration, budget analysis, training, team building, pre-submission assessment, compliance, submission of grant application and follow up. See Ms. Metchikoff-Hooker's resume in OTHER ATTACHMENTS for more information.

Proposed Researcher/Writer I (Key Personnel): Tanya Alvarez Khorram has over 17 years of professional experience in workforce development. Her experience includes managing the Community Career Development, Inc.'s workforce development grants; working with the Wells Fargo Bank Hire LA Youth Internship Program; and the California Council for Excellence (CCE) as a lead trainer for the California Awards for Performance Excellence (CAPE) examiners. She has conducted numerous training and webinar workshops for potential and current CCE examiners. Ms. Khorram has managed city, state and federally funded workforce development grants. Her experience helped PEP to prepare a robust 50-page CAPE Eureka application based on the Baldrige criteria for performance excellence on behalf of the Hollywood WorkSource Center, Managed Career Solutions (MCS), resulting in the coveted Eureka "Silver" award. See Ms. Khorram's resume in OTHER ATTACHMENTS for more information.

Proposed Project Analyst (Key Personnel): Carrie Thorne has over 10 years of experience in project management, training and development, and business operations. Carrie currently supports PEP in workforce development and grantee technical assistance projects, as well as analyzing internal business development opportunities, by gathering and analyzing information, generating document deliverables, and presenting data to PEP staff and customers to facilitate key decisions and actions. This includes analysis and generation of data and deliverables in MS Word, Excel, and PowerPoint, often taking the form of data sets, graphs and tables, briefings, reports, and presentations. In her time with Southern California Edison, she managed and implemented several enterprise-wide employee training and development programs and provided project management in support of enterprise change management efforts. Carrie will support a range of project tasks and analyses for PEP staff serving Pacific Gateway. See Ms. Thorne's resume in OTHER ATTACHMENTS for more information.

Proposed Administrative/Clerical I (Non-Key Personnel): PEP offers capable and experienced administrative support professionals through its corporate operation, with headquarters located in Huntington Beach, CA. They will provide administrative support to PEP project staff, as appropriate, including, but not limited to material production, photocopying, document generation and editing, meeting coordination, information gathering, and more.

The proposed Project Manager II, Researcher/Writer I, Project Analyst, and Administrative/Clerical I are local to the Long Beach area; all PEP staff are available to support the work expressed in this proposal.

Workforce Intermediary (RFP 3.5.6)

Demonstrated Competence

PEP brings to Pacific Gateway our proven experience in managing complex, large and small projects, and delivering high quality products based on deadlines and budgetary frameworks. We understand that with the completion of every short-term project, we are able to provide substantive support to meeting the long-term goals of our clients.

PEP has expertise and experience in successful project management: the process and activity of planning, organizing, motivating, and controlling resources, procedures and protocols to achieve specific goals. PEP has developed a national reputation, particularly among workforce development programs, for our project management strengths for executing long- and short-term contracts to transform our client's workforce development programs and services. PEP has years of experience in providing direct client services managing special projects and grants, working with workforce investment service providers nationwide, including Workforce Investment Boards (WIBs), AJCs (or One-Stop Centers), and community-based organizations.

Experience in Performance of Comparable Engagements

Our previous experience and proven capabilities in this area include:

- 1. Pacific Gateway:** PEP provided employer outreach and job placement services to job seekers that had completed one of three healthcare career training programs; Certified Medical Assistant, Medical Biller/Coder and Sterile Processing Technicians. This included employment workshops, resume services, and job search support to 59 job seekers, as well as outreach to 30 employers in the local area and industry.
- 2. Pacific Gateway:** PEP provided project management services with the Alternative and Renewable Fuel & Vehicle Technology Grant Program (AB118), in collaboration with International Trade Education Programs, Inc. (ITEP), and the Long Beach Unified School District to analyze the development, implementation, delivery, and student engagement level of career-technical exploration and training programs, most specifically those related to renewable/ alternative fuel and vehicle technologies.
- 3. Pacific Gateway:** PEP provided project management services in support of the Regional Cluster of Opportunity Grants (RICO) Initiative. RICO is a structured economic and workforce development planning process that supports Regional Economic and Workforce Development Networks consisting of economic and workforce development practitioners and industry to form partnerships that develop regional strategies to support and advance targeted industry clusters. This initiative's area of focus is alternative fuels technology in Orange and Los Angeles Counties. PEP ensured quarterly tasks and deliverables were completed in coordination with the Los Angeles Economic Development Corporation (LAEDC).
- 4. City of Oakland Workforce Investment Board:** PEP provided project management services to support and facilitate the evaluation of proposals for all of the City of Oakland's WIA-

funded external contracts, including its Comprehensive and Affiliate One-Stop Centers (now AJCs), Business Services and Youth Services providers.

- 5. Department of Labor:** PEP provides project management support to a variety of Department of Labor's workforce development programs. We deliver technical support and subject matter expertise to assist grantees in developing and enhancing their programs, including Women in Apprenticeships and Nontraditional Occupations (WANTO), Youth Ex-Offenders, Adult Ex-Offenders, Technical Skills Training, Jobs Accelerator and Make it in America grant programs.

Expertise and Availability of Key Personnel

Proposed Project Manager II (Key Personnel): Linda Metchikoff-Hooker, brings over 23 years of experience in workforce development projects, project management, leadership development, instructional design and training, technical assistance, information technology and quality assurance solutions. Ms. Metchikoff-Hooker has led high performing teams on Federal- and local-level government contracts. She is able to quickly review project requirements, develop project plans and timelines, and identify resources, milestones, possible risks, and measures of success while, at the same time, fostering a team environment focused on excellence and exceeding client expectations. Examples include the successful project management services of Pacific Gateway's Alternative and Renewable Fuel & Vehicle Technology Grant Program (AB118); Pacific Gateway's Regional Cluster of Opportunity Grants (RICO) Initiative; the Oakland Workforce Investment Board's (WIB) Youth and Adult Services proposals evaluation process; leading a team providing training and technical assistance services including conference planning, virtual roundtables, content development, webinars, website design including social media; and implementing a technical grant reviewer registration process, which included the development of a web-based training module, *Rating and Documenting Evaluative Feedback for Grant Applications*. See Ms. Metchikoff-Hooker's resume in OTHER ATTACHMENTS for more information.

Proposed Workforce Development Consultant (Key Personnel): Tressa Dorsey provides expertise in workforce development and WIOA program effectiveness, including grant writing, technical assistance coaching, program evaluation and reporting, training and career development, and strategic planning services. Ms. Dorsey recently worked with PEP and Pacific Gateway to deliver services focused on grant monitoring, employer engagement, and job seeker placement services. She has over 11 years of experience with a variety of workforce development customers including Long Beach Pacific Gateway, U.S. Department of Labor, U.S. Health & Human Services, and many state, county, and city organizations. See Ms. Dorsey's resume in OTHER ATTACHMENTS for more information.

Proposed Project Analyst (Key Personnel): Carrie Thorne has over 10 years of experience in project management, training and development, and business operations. Carrie currently supports PEP in workforce development and grantee technical assistance projects, as well as analyzing internal business development opportunities, by gathering and analyzing information, generating document deliverables, and presenting data to PEP staff and customers to facilitate

key decisions and actions. This includes analysis and generation of data and deliverables in MS Word, Excel, and PowerPoint, often taking the form of data sets, graphs and tables, briefings, reports, and presentations. In her time with Southern California Edison, she managed and implemented several enterprise-wide employee training and development programs and provided project management in support of enterprise change management efforts. Carrie will support a range of project tasks and analyses for PEP staff serving Pacific Gateway. See Ms. Thorne's resume in OTHER ATTACHMENTS for more information.

Proposed Administrative/Clerical I (Non-Key Personnel): PEP offers capable and experienced administrative support professionals through its corporate operation, with headquarters located in Huntington Beach, CA. They will provide administrative support to PEP project staff, as appropriate, including, but not limited to material production, photocopying, document generation and editing, meeting coordination, information gathering, and more.

The proposed Project Manager II, Project Analyst, and Administrative / Clerical I are local to the Long Beach area; all PEP staff are available to support the work expressed in this proposal.

Asset Mapping Board/System Development, Innovation and Measurement (RFP 3.5.9)

Demonstrated Competence

PEP has extensive capability to conduct the necessary work to inform, design, facilitate, and follow-up on board retreats and related business processes. PEP's workforce development, project management, and organization/team effectiveness expertise has the experience and talent to: 1) identify the appropriate intent and scope of a board retreat and business processes; 2) design and implement the appropriate assessment tools (such as structured interviews, surveys, or focus groups) and analyze data to inform the right design for the board retreats, plans, and actions; 3) provide expert meeting facilitation of people, logistics, brainstorming, decision-making, conflict management, action-plan development, strategic goal-setting, and performance improvement and evaluation; and 4) advise and provide consulting support to develop and implement appropriate follow-up from board retreat meetings, including detailed action-plan implementation, knowledge management/asset mapping, business process improvement plans, change management plans, communication plans, training plans, and performance improvement and evaluation. PEP brings a depth of understanding to the various nuances associated with conducting this work correctly and making it a success for the client, because PEP has done this many times with various organizations, boards, and teams.

Experience in Performance of Comparable Engagements

Our previous experience and proven capabilities in this area include:

- 1. Department of Labor, Employment and Training Administration, Office of Workforce Investment (OWI):** PEP designed and administered a customized team effectiveness assessment for 90 OWI staff across five divisions. The survey included customized assessment items using known best practice team effectiveness categories and input from OWI. An easy to use web-based survey tool was used for administration and reporting. PEP conducted quantitative and qualitative survey data analysis to establish priority response themes and priorities. PEP then facilitated Debrief and Action Planning sessions for each division to review the assessment results and to facilitate the development of a working action plan, owned by each team. Assessment results and action plans supported teams in implementing opportunities for improvement in operational effectiveness. PEP used time-tested best practices in survey instrument design and web-based survey administration. The survey assessment instrument was developed using customized items based on best practice operational effectiveness categories. SurveyMonkey.com web-based survey tool and reporting features were used to facilitate smooth, trouble-free, yet rich data yielding results. Custom statistical data analyses, both quantitative and qualitative, were used to yield further/enhanced understanding of survey results and implications. PEP used best practices in scoping work and advising the client prior to starting actual assessment work to achieve best practice solutions that truly fit the client need. Mr. Ramirez used expert facilitation techniques throughout the engagement to partner with key stakeholders, lead survey implementation, lead action planning sessions, and achieve client buy-in and value for this project.

2. **City of Long Beach, Long Beach Nonprofit Partnership, Leadership Institute:** PEP designed and facilitated two strategic sessions with multiple directors of non-profit boards to cover topics including Organizational Sustainability, Succession Planning, Talent Development, Performance Management, and Coaching. Session participants gained a foundation on how to support continued sustainability of their non-profit organizations and staff, as well as how to further develop staff to support long-term organizational and employee success.
3. **CA Hispanic Chamber of Commerce (CHCC):** PEP facilitated a Strategic Board Retreat with 20 CHCC Board Members. PEP led board members in a one-day planning meeting that focused on developing the vision and mission of CCHC. PEP's team of facilitators and trainers helped CCHC conduct a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis of the organization, prioritize strengths and opportunities, set SMART (Specific, Measurable, Achievable, Relevant, Time-Bound) Goals and establish an action plan for implementation of the Board Members. PEP staff Linda Metchikoff-Hooker led this effort, which included team-building activities to build trust and engage board members in open dialogue.
4. **Department of Labor, Employment and Training Administration, Workforce Excellence Network (WEN):** PEP provided leadership to the *Workforce Excellence Network* in an organizational development/change management effort that used the Baldrige Criteria as its framework to implement its improvement strategy. The focus was to influence organizational development and change management within ETA and its nationwide system of more than 600 local Workforce Investment Boards (WIBs) that deliver workforce services to the employers, youth, and unemployed individuals who are ETA's ultimate customers. The success of this strategy led to the inclusion of a continuance performance improvement component in the Workforce Investment Act (WIA) complete with required customer satisfaction feedback and incentives for high-quality performance against established performance metrics.

During the course of this contract PEP provided strategic planning expertise to design and implement effective strategic planning processes for national workforce development programs by integrating performance measurement and continuous improvement in a process that would effectively and successfully produce high levels of outcomes for workforce development customers. A critical component was linking internal strategic planning and performance management to the system-wide performance outcomes developed.

As an expert in organizational change and transition, PEP supported the process of organizational change and transition among the local, state, and federal entities that comprise the workforce system with the goal of providing job seekers, employers, and workers with the highest quality of services and level of customer satisfaction attainable. PEP also provided Human Resources and budgeting expertise; conducted outreach training programs, national trainings, four consecutive national conferences with over 200 workshops and over 3,000 participants; and provided Board Management Support to approximately 40 representatives from the public and private sectors from across the U.S.

Expertise and Availability of Key Personnel

Proposed Project Manager II (Key Personnel): Linda Metchikoff-Hooker brings over 23 years' experience in workforce development projects, project management, leadership development, instructional design and training, technical assistance, information technology and quality assurance solutions. Ms. Metchikoff-Hooker has led high performing teams on Federal- and local-level government contracts. She has designed national leadership development program and presented courseware to over 250 managers, supervisors and team leads with above-average post-test scores over a ten-year period. Topics include Establishing Performance Expectations, Managing Change, and Coaching for Optimal Performance. She has developed up to 12-day new hire orientation-training programs using adult learning principles and Kirkpatrick evaluation criteria. Most recently, she provided facilitation services for the California Hispanic Chamber of Commerce annual board retreat. See Ms. Metchikoff-Hooker's resume in OTHER ATTACHMENTS for more information.

Proposed Organization Effectiveness Consultant: Jaime Ramirez possesses expertise in improving organizational and team performance. He has over 22 years of experience working on projects focused on assessing organizational performance, team facilitation, documenting organizational assets (knowledge management), and facilitating action plan implementation and solutions. He holds an advanced degree in Industrial/Organizational Psychology and is experienced in designing and using assessment/survey instruments, interviews, and other data collection methods to assess, measure, and facilitate organizational improvement efforts and best practices. He has provided services for customers within the City of Long Beach, City of Los Angeles, U.S. Department of Labor, U.S. Department of Health and Human Services, U.S. Department of Energy, University of Indiana, and Southern California Edison. See Mr. Ramirez's resume in OTHER ATTACHMENTS for more information.

Proposed Workforce Development Consultant (Key Personnel): Tressa Dorsey provides expertise in workforce development and WIOA program effectiveness, including grant writing, technical assistance coaching, program evaluation and reporting, training and career development, and strategic planning services. Ms. Dorsey recently worked with PEP and Pacific Gateway to deliver services focused on grant monitoring, employer engagement, and job seeker placement services. She has over 11 years of experience with a variety of workforce development customers including Long Beach Pacific Gateway, U.S. Department of Labor, U.S. Health & Human Services, and many state, county, and city organizations. See Ms. Dorsey's resume in OTHER ATTACHMENTS for more information.

Proposed Project Analyst (Key Personnel): Carrie Thorne has over 10 years of experience in project management, training and development, and business operations. Carrie currently supports PEP in workforce development and grantee technical assistance projects, as well as analyzing internal business development opportunities, by gathering and analyzing information, generating document deliverables, and presenting data to PEP staff and customers to facilitate key decisions and actions. This includes analysis and generation of data and deliverables in MS Word, Excel, and PowerPoint, often taking the form of data sets, graphs and tables, briefings, reports, and presentations. In her time with Southern California Edison, she managed and

implemented several enterprise-wide employee training and development programs and provided project management in support of enterprise change management efforts. Carrie will support a range of project tasks and analyses for PEP staff serving Pacific Gateway. See Ms. Thorne's resume in OTHER ATTACHMENTS for more information.

Proposed Administrative/Clerical I (Non-Key Personnel): PEP offers capable and experienced administrative support professionals through its corporate operation, with headquarters located in Huntington Beach, CA. They will provide administrative support to PEP project staff, as appropriate, including, but not limited to material production, photocopying, document generation and editing, meeting coordination, information gathering, and more.

The proposed Project Manager II, Organization Effectiveness Consultant, Project Analyst, and Administrative / Clerical I are local to the Long Beach area; all PEP staff are available to support the work expressed in this proposal.

Project Management (RFP 3.5.10)

Demonstrated Competence

PEP brings to Pacific Gateway our proven experience in managing complex, large and small projects, and delivering high quality products based on deadlines and budgetary frameworks. We understand that with the completion of every short-term project, we are able to provide substantive support to meeting the long-term goals of our clients.

PEP has expertise and experience in successful project management: the process and activity of planning, organizing, motivating, and controlling resources, procedures and protocols to achieve specific goals. PEP has developed a national reputation, particularly among workforce development programs, for our project management strengths for executing long- and short-term contracts to transform our client's workforce development programs and services. PEP has years of experience in providing direct client services managing special projects and grants, working with workforce investment service providers nationwide, including Workforce Investment Boards (WIBs), AJCs (or One-Stop Centers), and community-based organizations.

Experience in Performance of Comparable Engagements

Our previous experience and proven capabilities in this area include:

- 1. Pacific Gateway:** PEP provided project management services with the Alternative and Renewable Fuel & Vehicle Technology Grant Program (AB118), in collaboration with International Trade Education Programs, Inc. (ITEP), and the Long Beach Unified School District to analyze the development, implementation, delivery, and student engagement level of career-technical exploration and training programs, most specifically those related to renewable/ alternative fuel and vehicle technologies.
- 2. Pacific Gateway:** PEP provided project management services in support of the Regional Cluster of Opportunity Grants (RICO) Initiative. RICO is a structured economic and workforce development planning process that supports Regional Economic and Workforce Development Networks consisting of economic and workforce development practitioners and industry to form partnerships that develop regional strategies to support and advance targeted industry clusters. This initiative's area of focus is alternative fuels technology in Orange and Los Angeles Counties. PEP ensured quarterly tasks and deliverables were completed in coordination with the Los Angeles Economic Development Corporation (LAEDC).
- 3. City of Oakland Workforce Investment Board:** PEP provided project management services to support and facilitate the evaluation of proposals for all of the City of Oakland's WIA-funded external contracts, including its Comprehensive and Affiliate One-Stop Centers (now AJCs), Business Services and Youth Services providers.
- 4. Department of Labor:** PEP provides project management support to a variety of Department of Labor's workforce development programs. We deliver technical support and subject matter expertise to assist grantees in developing and enhancing their programs,

including Women in Apprenticeships and Nontraditional Occupations (WANTO), Youth Ex-Offenders, Adult Ex-Offenders, Technical Skills Training, Jobs Accelerator and Make it in America grant programs.

Expertise and Availability of Key Personnel

Proposed Project Manager II (Key Personnel): Linda Metchikoff-Hooker brings over 23 years of experience in workforce development projects, project management, leadership development, instructional design and training, technical assistance, information technology and quality assurance solutions. Ms. Metchikoff-Hooker has led high performing teams on Federal- and local-level government contracts. She is able to quickly review project requirements, develop project plans and timelines, and identify resources, milestones, possible risks, and measures of success while, at the same time, fostering a team environment focused on excellence and exceeding client expectations. Examples include the successful project management services for Pacific Gateway's Business Outreach Youth Opportunity/Hire-a-Youth campaign and for Pacific Gateway's Enterprise Zone Marketing Campaign. For the Marketing Campaign, she led a team providing training and technical assistance services including conference planning, virtual roundtables, content development, webinars, website design, and social media. See Ms. Metchikoff-Hooker's resume in OTHER ATTACHMENTS for more information.

Proposed Workforce Development Consultant (Key Personnel): Tressa Dorsey provides expertise in workforce development and WIOA program effectiveness, including grant writing, technical assistance coaching, program evaluation and reporting, training and career development, and strategic planning services. Ms. Dorsey recently worked with PEP and Pacific Gateway to deliver services focused on grant monitoring, employer engagement, and job seeker placement services. She has over 11 years of experience with a variety of workforce development customers including Long Beach Pacific Gateway, U.S. Department of Labor, U.S. Health & Human Services, and many state, county, and city organizations. See Ms. Dorsey's resume in OTHER ATTACHMENTS for more information.

Proposed Project Analyst (Key Personnel): Carrie Thorne has over 10 years of experience in project management, training and development, and business operations. Carrie currently supports PEP in workforce development and grantee technical assistance projects, as well as analyzing internal business development opportunities, by gathering and analyzing information, generating document deliverables, and presenting data to PEP staff and customers to facilitate key decisions and actions. This includes analysis and generation of data and deliverables in MS Word, Excel, and PowerPoint, often taking the form of data sets, graphs and tables, briefings, reports, and presentations. In her time with Southern California Edison, she managed and implemented several enterprise-wide employee training and development programs and provided project management in support of enterprise change management efforts. Carrie will support a range of project tasks and analyses for PEP staff serving Pacific Gateway. See Ms. Thorne's resume in OTHER ATTACHMENTS for more information.

Proposed Administrative/Clerical I (Non-Key Personnel): PEP offers capable and experienced administrative support professionals through its corporate operation, with headquarters

located in Huntington Beach, CA. They will provide administrative support to PEP project staff, as appropriate, including, but not limited to material production, photocopying, document generation and editing, meeting coordination, information gathering, and more.

The proposed Project Manager II, Project Analyst, and Administrative / Clerical I are local to the Long Beach area; all PEP staff are available to support the work expressed in this proposal.

One-Stop Operator – America’s Job Centers of California (RFP 3.5.11)

Demonstrated Competence

PEP has years of experience working with workforce investment service providers nationwide, including Workforce Investment Boards (WIBs), America’s Job Centers (AJCs or One-Stop Centers), and community-based organizations. PEP understands Pacific Gateway, America’s Job Centers of California, including: Career Transition Center, Youth Opportunity Center, and Harbor Gateway WorkSource Center. PEP has provided one-stop operator support services to Pacific Gateway for several years, including employer engagement, marketing and outreach, job seeker assistance, community partnership support, workforce board facilitation and support, and assistance with performance measures. PEP has the experience and team to provide requested coordination and oversight of WIOA-required one-stop partnerships and services, including partner convenings, reports to the workforce development board, and customer satisfaction measures.

Experience in Performance of Comparable Engagements

Our previous experience and proven capabilities in this area include:

- 1. Pacific Gateway:** PEP provided employer outreach and job placement services to job seekers that had completed one of three healthcare career training programs; Certified Medical Assistant, Medical Biller/Coder and Sterile Processing Technicians. This included employment workshops, resume services, and job search support to 59 job seekers, as well as outreach to 30 employers in the local area and industry.
- 2. Pacific Gateway:** PEP provided project management services with the Alternative and Renewable Fuel & Vehicle Technology Grant Program (AB118), in collaboration with International Trade Education Programs, Inc. (ITEP), and the Long Beach Unified School District to analyze the development, implementation, delivery, and student engagement level of career-technical exploration and training programs, most specifically those related to renewable/ alternative fuel and vehicle technologies.
- 3. Pacific Gateway:** PEP provided project management services in support of the Regional Cluster of Opportunity Grants (RICO) Initiative. RICO is a structured economic and workforce development planning process that supports Regional Economic and Workforce Development Networks consisting of economic and workforce development practitioners and industry to form partnerships that develop regional strategies to support and advance targeted industry clusters. This initiative’s area of focus is alternative fuels technology in Orange and Los Angeles Counties. PEP ensured quarterly tasks and deliverables were completed in coordination with the Los Angeles Economic Development Corporation (LAEDC).
- 4. City of Los Angeles, Performance Partnership Pilot (P3):** PEP provides technical support to P3 grant recipient, City of Los Angeles. PEP supports community partner collaboration, integration, strategy planning, and service delivery efforts related to P3 grant

implementation and service provided to disconnected youth within the city of Los Angeles. As such, the City of Los Angeles P3 grant implementation and its community partnership network are able to provide disconnected youth better, timely, and more integrated services to support housing, health, welfare, education, employment, and more.

5. **City of Oakland Workforce Investment Board:** PEP provided project management services to support and facilitate the evaluation of proposals for all of the City of Oakland's WIA-funded external contracts, including its Comprehensive and Affiliate One-Stop Centers (now AJCs), Business Services and Youth Services providers.
6. **Department of Labor:** PEP provides project management support to a variety of Department of Labor's workforce development programs. We deliver technical support and subject matter expertise to assist grantees in developing and enhancing their programs, including Women in Apprenticeships and Nontraditional Occupations (WANTO), Youth Ex-Offenders, Adult Ex-Offenders, Technical Skills Training, Jobs Accelerator and Make it in America grant programs.

Expertise and Availability of Key Personnel

Proposed Project Manager II (Key Personnel): Linda Metchikoff-Hooker brings over 23 years of experience in workforce development projects, project management, leadership development, instructional design and training, technical assistance, information technology and quality assurance solutions. Ms. Metchikoff-Hooker has led high performing teams on Federal- and local-level government contracts. She is able to quickly review project requirements, develop project plans and timelines, and identify resources, milestones, possible risks, and measures of success while, at the same time, fostering a team environment focused on excellence and exceeding client expectations. Examples include the successful project management services for Pacific Gateway's Business Outreach Youth Opportunity/Hire-a-Youth campaign and for Pacific Gateway's Enterprise Zone Marketing Campaign. For the Marketing Campaign, she led a team providing training and technical assistance services including conference planning, virtual roundtables, content development, webinars, website design, and social media. See Ms. Metchikoff-Hooker's resume in OTHER ATTACHMENTS for more information.

Proposed Workforce Development Consultant (Key Personnel): Tressa Dorsey provides expertise in workforce development and WIOA program effectiveness, including grant writing, technical assistance coaching, program evaluation and reporting, training and career development, and strategic planning services. Ms. Dorsey recently worked with PEP and Pacific Gateway to deliver services focused on grant monitoring, employer engagement, and job seeker placement services. She has over 11 years of experience with a variety of workforce development customers including Long Beach Pacific Gateway, U.S. Department of Labor, U.S. Health & Human Services, and many state, county, and city organizations. See Ms. Dorsey's resume in OTHER ATTACHMENTS for more information.

Proposed Researcher/Writer I (Key Personnel): Tanya Alvarez Khorram has over 17 years of professional experience in workforce development. Her experience includes managing the Community Career Development, Inc.'s workforce development grants; working with the Wells

Fargo Bank Hire LA Youth Internship Program; and the California Council for Excellence (CCE) as a lead trainer for the California Awards for Performance Excellence (CAPE) examiners. She has conducted numerous training and webinar workshops for potential and current CCE examiners. Ms. Khorram has managed city, state and federally funded workforce development grants. Her experience helped PEP to prepare a robust 50-page CAPE Eureka application based on the Baldrige criteria for performance excellence on behalf of the Hollywood WorkSource Center, Managed Career Solutions (MCS), resulting in the coveted Eureka "Silver" award. See Ms. Khorram's resume in OTHER ATTACHMENTS for more information.

Proposed Project Analyst (Key Personnel): Carrie Thorne has over 10 years of experience in project management, training and development, and business operations. Carrie currently supports PEP in workforce development and grantee technical assistance projects, as well as analyzing internal business development opportunities, by gathering and analyzing information, generating document deliverables, and presenting data to PEP staff and customers to facilitate key decisions and actions. This includes analysis and generation of data and deliverables in MS Word, Excel, and PowerPoint, often taking the form of data sets, graphs and tables, briefings, reports, and presentations. In her time with Southern California Edison, she managed and implemented several enterprise-wide employee training and development programs and provided project management in support of enterprise change management efforts. Carrie will support a range of project tasks and analyses for PEP staff serving Pacific Gateway. See Ms. Thorne's resume in OTHER ATTACHMENTS for more information.

Proposed Administrative/Clerical I (Non-Key Personnel): PEP offers capable and experienced administrative support professionals through its corporate operation, with headquarters located in Huntington Beach, CA. They will provide administrative support to PEP project staff, as appropriate, including, but not limited to material production, photocopying, document generation and editing, meeting coordination, information gathering, and more.

The proposed Project Manager II, Researcher/Writer I, Project Analyst, and Administrative / Clerical I are local to the Long Beach area; all PEP staff are available to support the work expressed in this proposal.

Fiscal Stability

PEP has time-proven, best-practice financial systems and business processes in place that ensure reliable and effective internal company operations, as well as services to PEP customers. PEP uses a proven, federally audited, federal government contractor accounting system. This accounting system, PEP's associated work processes, and regular internal and external audits, ensure PEP provides fiscal reliability and accountability to its company operations, customers, financial auditors, and government contracting agencies. Furthermore, PEP employs several experts in finance, accounting, and accounts payable. This include PEP's management team, finance and accounting staff, and external accounting firm support. Therefore, PEP's staff are able to interact with customers to support effective budgets, cost allocation, expenditures, time-keeping, invoicing, and other related matters. PEP will submit proper and accurate invoices to Pacific Gateway in a timely manner, as well as effectively monitor and update all customer contract-related expenditures and financial-related reporting to ensure timely and effective communication about contract budget status.

OTHER ATTACHMENTS

Primary Contractor Information

9.1: Primary Contractor Information

Primary Contractor:	Performance Excellence Partners, LLC
Company Ownership:	Rachel E. Ramirez, President & CEO
Date/State of Incorporation:	Delaware: August 28, 2000 California Filed: August 7, 2003
Company Location:	7911 Professional Circle, Huntington Beach, CA 92648
Location of Office Serving CA Accounts:	Same as above
Number of Employees:	Local: Five full-time employees; National: 10+ employees (full-time and part-time)
Location from which employees will be assigned:	Same as above
Virtual and Onsite Locations:	California, Washington DC area
PEP Point of Contact Name, address and telephone number	Rachel E. Ramirez 7911 Professional Circle Huntington Beach, CA 92648 714-374-1140 rramirez@performexcel.com

Company Background

Since 1999, PEP has grown from a small company with a single contract to one whose clients have included the California Workforce Association, City of Long Beach, City of Los Angeles, City of Santa Ana, City of Oakland, California Hispanic Chamber of Commerce, Hollywood WorkSource Center, Managed Career Solutions as well as several Federal agencies including the U.S. Departments of Education, Energy, Health and Human Services, Homeland Security, and Labor. Dedicated to its vision and core values, PEP has successfully executed complex, multi-task projects both as a prime contractor and a key subcontractor. Our talented team brings in-depth experience in workforce development, performance and project management; financial, budget and administrative; workforce analysis and human capital planning; training and technical assistance and quality assurance.

Working with multi-level agencies, PEP has successfully managed workforce development initiatives, programs, and services resulting from the Workforce Investment Act of 1998 with creative client-informed solutions that utilize proven best practices to improve the efficiency and effectiveness of processes, systems, people, and operations. PEP's professional management services include subject matter expert consulting, technical and administrative, strategic alliance building, high performance work, leadership systems, process and productivity improvement, organizational assessments, performance measures and indicators, systems

alignment, and the process of organizational change and transition with local, state, and Federal entities that comprise the workforce system.

PEP has delivered workforce development services parallel to those outlined in the City's RFP for more than 17 years. PEP is currently identified as a preferred vendor for Pacific Gateway under the current Contract # 33830 for Workforce Development Services. Our goal is to work closely with Pacific Gateway to improve the management and support systems that align with the strategic actions and objectives of Pacific Gateway's Workforce Investment Board (WIB). Pacific Gateway will have access to PEP's diverse range of consulting services and technical experts to develop and implement performance excellence models and tools, promote partnerships and networks that serve to optimize workforce investment resources, and to deliver the support services, training, and best practices that foster success within the workforce development community – job seekers, employers, partners and other key stakeholders.

PEP has the administrative and fiscal capacity to fulfill Federal and state-required documentation and record keeping to support the services required by the City of Long Beach. Our firm is equipped with an operations team to manage our organization's human resources, operations, accounting and budgeting requirements. PEP retains the expertise of a financial management consulting firm, MGO Mensch, to ensure external assurance to track our tax, accounting, auditing, and bookkeeping needs. We supplement this expertise with our own internal assurance methods using QuickBooks and an electronic and hard copy contract filing system. We also consult with Viscarra & Associates to provide annual auditing services. Staff managing the City's contract will maintain a project management system using quality assurance and performance management benchmarks to ensure continuous improvement and accomplishment of required deliverables.

We clearly understand that the City of Long Beach is the administrative entity for Pacific Gateway's Federal, state and local workforce development grant programs, and Pacific Gateway coordinates services supporting the workforce needs of the residents and local businesses. PEP also understands Pacific Gateway's WIB services, which provide WIOA-funded youth, adult and business workforce programs. With its extensive workforce development background and expertise, PEP is uniquely qualified to support the array of programs provided through Pacific Gateway's Career Transition Center, Youth Opportunity Center, Harbor WorkSource Center, as well as other non-profit and education institutions throughout the region. PEP is pleased to partner with Pacific Gateway in their commitment to responsive strategies that address the current and future needs of the industries that drive our economy, while ensuring a skilled and educated workforce.

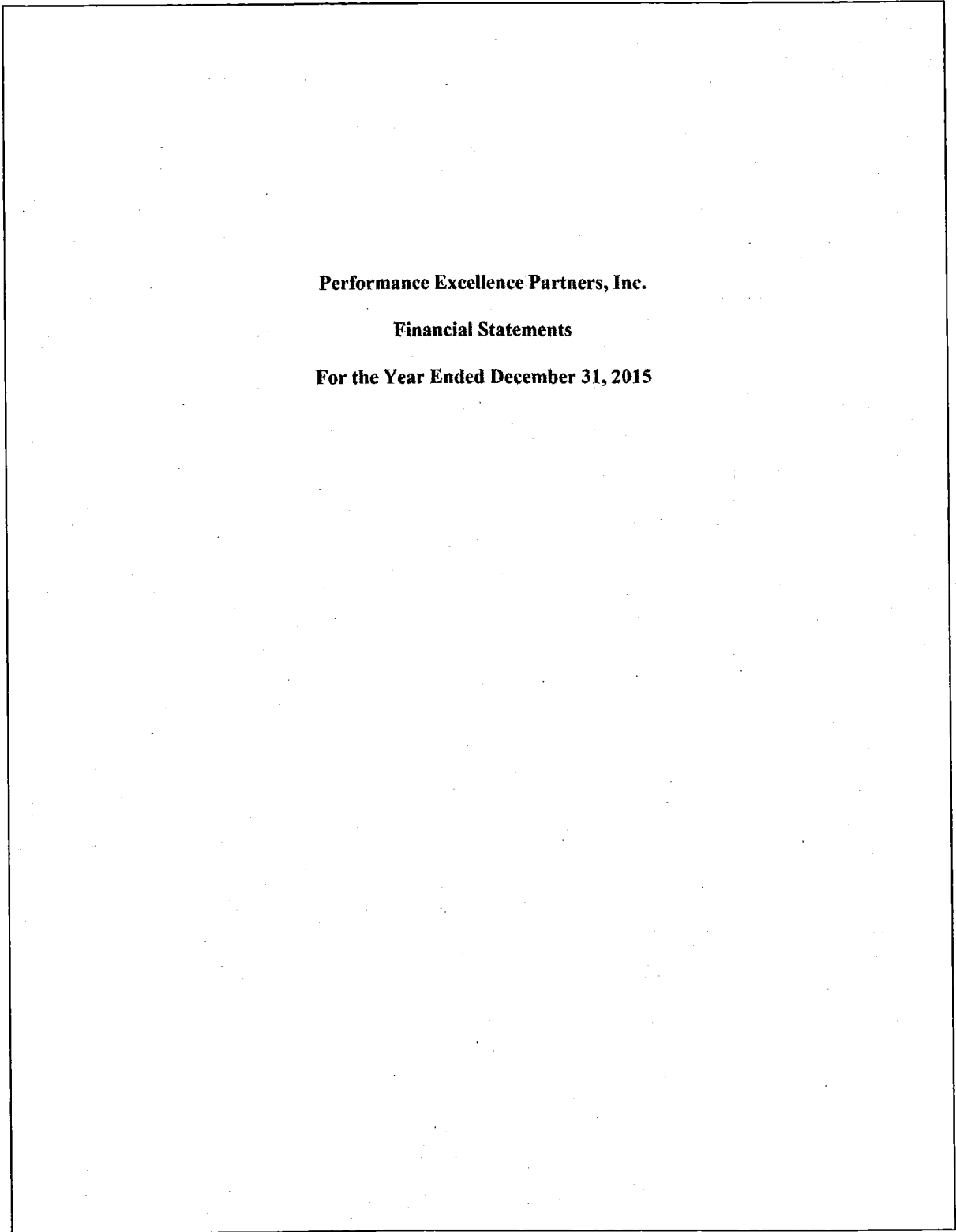
PEP operates as a certified Woman-Owned Small Business (WOSB) under the Small Business Administration (SBA), and is the local ACDBE small business owner of the Paradise Shops, a retail franchise, with employees located at the Orange County and Long Beach Airports. PEP successfully graduated from the Small Business Administration's 8(a) program for small, woman- and minority-owned businesses in 2012, and currently mentors two new woman-owned 8(a) companies.

In 2011, PEP received the Protégé of the Year award, and in 2013, received the Woman-Owned Small Business of the Year award from the U.S. Department of Energy. Over the past several years, PEP has provided technical assistance and support to over nine Federal grant programs comprised of over 250 grantees. Most recently, PEP was one of 35 small businesses awarded the GSA Human Capital and Training Solutions Small Business Pool 2 contract.

As a local firm based in Huntington Beach, CA, Pacific Gateway will have immediate access to PEP's dedicated team of experts in workforce development, project management, grantee technical assistance, training and development, facilitation, strategic planning, communications and marketing outreach, and continuous improvement.

Key Personnel Resumes are attached further below.

Financial Stability



Performance Excellence Partners, Inc.

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For the Year Ended December 31, 2015

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Email Steviscar@aol.com

Viscarra & Associates

Accountants and
Management Consultants

Independent Auditor's Report

To the Stockholder
Performance Excellence Partners, Inc.
Huntington Beach, California

Report on the Financial Statements

We have audited the accompanying financial statements of Performance Excellence Partners, Inc. (an S corporation) which comprise the balance sheet as of December 31, 2015, and the related statements of income and retained earnings and cash flows for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion.

An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Performance Excellence Partners, Inc. as of December 31, 2015, and the results of its operations and its cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

Washington, District of Columbia
August 2, 2016

Performance Excellence Partners, Inc.

BALANCE SHEET

December 31, 2015

ASSETS	
CURRENT ASSETS	
Cash	\$ 1,075,740
Prepays	37,727
Accounts receivable, net of allowance for doubtful accounts of nil	<u>305,055</u>
TOTAL CURRENT ASSETS	1,418,522
FIXED ASSETS, net of accumulated depreciation of \$78,607	30,562
OTHER ASSETS	
Deposits	4,898
Advance	230
Investments	<u>127,810</u>
TOTAL OTHER ASSETS	<u>132,938</u>
TOTAL ASSETS	\$ 1,582,022
LIABILITIES AND STOCKHOLDERS' EQUITY	
CURRENT LIABILITIES	
Accounts payable	\$ 333,682
Credit card payable	14,259
Accrued wages	89,209
Accrued other	<u>138,669</u>
TOTAL CURRENT LIABILITIES	<u>575,819</u>
STOCKHOLDERS' EQUITY	
Common stock, \$1 par value (500 shares authorized, issued and outstanding)	500
Retained earnings	<u>1,005,703</u>
TOTAL STOCKHOLDERS' EQUITY	<u>1,006,203</u>
TOTAL LIABILITIES AND STOCKHOLDERS' EQUITY	\$ 1,582,022

The accompanying Notes to the Financial Statements are an integral part of these financial statements.

Performance Excellence Partners, Inc.

STATEMENT OF INCOME AND RETAINED EARNINGS

For the Year Ended December 31, 2015

REVENUE	
Government	\$ 5,988,210
Commercial	909,553
State and local	<u>23,225</u>
TOTAL REVENUE	6,920,988
EXPENSES	
DIRECT COSTS	
Subcontractors	1,980,885
Labor	1,799,792
Consultants	199,557
Honorariums	199,500
Travel	189,690
Materials and supplies	16,817
Conference fees	7,500
Printing and reproduction	1,978
Other	<u>12,700</u>
TOTAL DIRECT COSTS	4,408,419
FRINGE BENEFITS	
Employer payroll taxes	207,181
Medical insurance	195,196
Paid time off	165,143
Holiday	91,296
Bonus	80,538
Pension	49,595
Sick and personal leave	28,111
Life insurance	18,288
Workers compensation	16,542
Administration fees	2,679
Flexible spending	2,388
Jury duty	776
Bereavement leave	<u>764</u>
TOTAL FRINGE BENEFITS	858,497
OVERHEAD	
Labor	179,592
Recruitment	6,965
Travel	3,865
Conferences and seminars	1,584
Consultants	<u>170</u>
TOTAL OVERHEAD	192,176

The accompanying Notes to the Financial Statements are an integral part of these financial statements.

Performance Excellence Partners, Inc.

STATEMENT OF INCOME AND RETAINED EARNINGS -- continued

For the Year Ended December 31, 2015

GENERAL AND ADMINISTRATIVE		
Labor		\$ 310,473
Consultants		111,602
Accounting		35,711
Dues and subscriptions		24,235
Travel and meals		20,185
Legal		16,369
Professional development		5,573
Payroll service		4,896
Meetings and seminars		4,646
Tuition reimbursement		2,500
Licenses and fees		578
Other		<u>249</u>
TOTAL GENERAL AND ADMINISTRATIVE		537,017
FACILITIES		
Rent		60,446
Repairs and maintenance		16,205
Depreciation		16,196
Internet		16,035
Telephone and fax		13,851
Outside services		9,999
Office supplies		9,911
Labor		9,324
Office expense		8,551
Automobile expense		4,451
Printing and reproduction		3,279
Postage and delivery		2,742
Storage		2,575
Utilities		1,527
Website maintenance		199
Sublease rent		<u>(9,657)</u>
TOTAL FACILITIES		165,634
TOTAL OTHER INCOME (EXPENSE)		<u>(17,775)</u>
TOTAL EXPENSES		6,179,518
	NET INCOME BEFORE INCOME TAXES	<u>741,470</u>
INCOME TAXES		(15,558)
	NET INCOME AFTER TAXES	<u>725,912</u>
RETAINED EARNINGS -- BEGINNING		1,556,439
DISTRIBUTIONS		<u>(1,276,648)</u>
	RETAINED EARNINGS -- ENDING	<u>\$ 1,005,703</u>

The accompanying Notes to the Financial Statements are an integral part of these financial statements.

Performance Excellence Partners, Inc.

STATEMENT OF CASH FLOWS

For the Year Ended December 31, 2015

CASH FLOWS FROM OPERATING ACTIVITIES

Net income	\$ 725,912
Adjustments to reconcile net profit to net cash provided by operating activities	
Depreciation	16,196
Accounts receivable	646,458
Prepays	(14,394)
Related party receivable	122,000
Advance	9,770
Deposits	3,784
Accounts payable	77,050
Accrued wages	(90,051)
Credit card payable	14,259
Accrued other	<u>(14,973)</u>

NET CASH PROVIDED BY OPERATING ACTIVITIES 1,496,011

CASH FLOWS FROM INVESTING ACTIVITIES

Investment sales	72,109
Acquisition of equipment	<u>(16,713)</u>

NET CASH PROVIDED BY INVESTING ACTIVITIES 55,396

CASH FLOWS FROM FINANCING ACTIVITIES

Distributions	<u>(1,276,648)</u>
---------------	--------------------

NET CASH USED BY FINANCING ACTIVITIES (1,276,648)

NET INCREASE IN CASH 274,759

CASH AT BEGINNING OF YEAR 800,981

CASH AT END OF YEAR \$ 1,075,740

Cash paid during the year for:

Interest	\$ 0
Income taxes	19,746

The accompanying Notes to the Financial Statements are an integral part of these financial statements.

Performance Excellence Partners, Inc.

FINANCIAL STATEMENTS

December 31, 2015

Note 1 **SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

This summary of significant accounting policies of Performance Excellence Partners, Inc. is presented to assist in understanding the financial statements. The financial statements and notes are representations of management who is responsible for their integrity and objectivity of the financial statements. These accounting policies conform to generally accepted accounting principles and have been consistently applied in the preparation of the financial statements.

Nature of Operations

Performance Excellence Partners, Inc. provides organization effectiveness and management consulting services to federal/state government and non-government organizations in the areas of workforce development; program design; management and technical assistance; training and development; leadership and management development; project management; change management; design and implementation of performance improvement initiatives; and meeting/conference planning.

Basis of Accounting

The financial statements of Performance Excellence Partners, Inc. have been prepared on the accrual basis of accounting.

Cash and Cash Equivalents

For purposes of the statement of cash flows, Performance Excellence Partners, Inc. considers all highly liquid investments with an original maturity of three months or less to be cash equivalents.

Trade Accounts Receivable

Trade accounts receivable is recorded at the amount the Company expects to collect on balances outstanding at year-end. Performance Excellence Partners, Inc. accounts for bad debts using the direct write-off method. Expense is recognized only when a specific account is determined to be uncollectible. Bad debt expense for the period ended December 31, 2015 was \$0.

Fixed Assets and Depreciation

The Company's property and equipment are recorded at cost. Depreciation of fixed assets is provided for using the straight-line method over the estimated useful lives. Maintenance and repairs are charged to operations when incurred.

Consideration of Credit Risk

The Company maintains their cash in bank deposit accounts at a high credit quality financial institution. The balance, at times, may exceed federally insured limits, but management does not consider this a significant concentration of credit risk.

Performance Excellence Partners, Inc.

NOTES TO FINANCIAL STATEMENTS - continued

December 31, 2015

Note 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Employee Benefits

The cost of employee benefits and compensated leave are accrued as they are vested to the employee. The Company does not maintain any unfunded retirement or health care plans.

Revenue Recognition

Performance Excellence Partners, Inc. records revenue in the financial statements when amounts are realized and amounts are earned.

Use of Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from these estimates.

Note 2 INCOME TAXES

The provision for income taxes consists of the following:

Federal Income Taxes	\$ 0
State Income Taxes	<u>0</u>
Total Taxes Due	<u>\$ 0</u>

Note 3 FIXED ASSETS

The fixed assets are summarized as follows:

Vehicle	\$ 38,803
Equipment	37,863
Furniture	<u>32,503</u>
Total fixed assets	109,169
Less: Accumulated depreciation	<u>78,607</u>
Fixed assets, net of accumulated depreciation	<u>\$ 30,562</u>

Depreciation expense for the period ending December 31, 2015 was \$ 16,196.

Note 4 LINE OF CREDIT

The shareholder obtained a line of credit on August 12, 2009. The line of credit has a maximum capacity in the amount of \$150,000. The interest rate associated with the line of credit is 10%. On December 31, 2015, the outstanding balance on the line of credit was nil.

Performance Excellence Partners, Inc.

NOTES TO FINANCIAL STATEMENTS – continued

December 31, 2015

Note 5 LEASE COMMITMENTS

On March 31, 2015, the Company leased office space under a noncancelable operating lease from a related party. The lease commenced on the close of escrow and terminates on the 25 year anniversary of the close of escrow. Future lease payments are as follows:

Year 2016	\$ 63,600
Year 2017	63,600
Year 2018	63,600
Year 2019	63,600
Year 2020	63,600
Thereafter	1,224,300

Note 6 RETIREMENT PLAN

The Company adopted the Performance Excellence Partners, Inc. 401(K) Plan effective December 31, 2012. The 401(K) plan is available to employees who are at least age 21. Employees enter the 401(k) plan on the first day of the month on or after meeting eligibility requirements. The Company may match part of the pay contributed to the 401(K) plan through salary deferral. The Company matching contributions will not be more than \$3,000. The Company may make a discretionary contribution at the end of the 401(K) plan year.

Note 7 CONTINGENCIES

The Company enters into contracts with government organizations to provide services. These contracts are subject to governmental audit for contractual performance and compliance. As of December 31, 2015, management believes there are no material adjustments as a result of governmental audits that need to be made to the financial statements.

Note 8 RELATED PARTY

The Company entered into a lease agreement to lease office space.

Note 9 DATE OF MANAGEMENT EVALUATION

In preparing the financial statements, management has evaluated events and transactions for potential recognition or disclosure through August 2, 2016, the date the financial statements were available to be issued.

Subcontractor Information

9.2: Subcontractor Information

9.2.1: Does this proposal include the use of subcontractors?

Yes _____ No Initials RER

List of References

9.3: References

Reference #1:	
Client Name:	Pacific Gateway
Project Description:	Provided employer outreach and job placement services to job seekers that had completed one of three healthcare career training programs; Certified Medical Assistant, Medical Biller/Coder and Sterile Processing Technicians. This included employment workshops, resume services, and job search support to 59 job seekers, as well as outreach to 30 employers in the local area and industry.
Project Dates:	7/1/15-11/13/15; Amendment #1 POP 11/14/15-3/31/16
Technical Environment:	Workforce Development
Staff Assigned:	Tressa Dorsey, Tami Simon
Client Project Manager and phone number:	Alisa Munoz, alisa.munoz@pacific-gateway.org 562-570-3748
Reference #2:	
Client Name:	Pacific Gateway
Project Description:	Regional Cluster of Opportunity Grants (RICO) Initiative: Provided project management services to ensure quarterly tasks and deliverables were completed in coordination with the Los Angeles Economic Development Corporation (LAEDC).
Project Dates:	1/1/14-12/31/14
Technical Environment:	Workforce Development; Workforce Intermediary
Staff Assigned:	Linda Metchikoff-Hooker, Tanya Alvarez Khorram
Client Project Manager and phone number:	Erick Serrato, erick.serrato@pacific-gateway.org 562-570-3762
Reference #3:	
Client Name:	Pacific Gateway
Project Description:	Provided project management and grant support services to prepare Pacific Gateway's H-1B Ready to Work Partnership and Workforce Innovation Fund grant applications for submission.
Project Dates:	4/30/14-6/19/14
Technical Environment:	Workforce Development; Grant Writing/Project Development
Staff Assigned:	Linda Metchikoff-Hooker
Client Project Manager and phone number:	Carla Hendy-Anquiano, carla.hendy-anquiano@pacific-gateway.org; 562-570-4721

9.4: Business License

Not applicable. Performance Excellence Partners operates out of the city of Huntington Beach, CA.

Key Personnel Resumes

Linda Metchikoff-Hooker (Project Manager II)

Performance Excellence Partners, LLC

lindamh@performexcel.com

Mobile: 714-800-3384

Expertise & Key Skills

- Over 23 years of experience in management, leadership development, technical assistance (TA), facilitation, instructional design, coaching, and event/conference planning services
- Build and maintain strong internal and external customer relationships
- Lead high performing teams at the Federal and local level
- Manage all aspects of multi-year government contracts with awards up to \$3.9M (IDIQ)
- Proficient in Microsoft Word, Excel and PowerPoint, SharePoint and WebEx

Key Accomplishments

- Successfully planned and executed 49 national or regional-level convenings over a 2.5-year period with audience sizes ranging from 30 to 815
 - *"It was a pleasure meeting and working with you! Your expertise, professionalism and attention to detail made the two-day meeting a huge success!" Marilyn Fountain, Office of Career, Technical and Adult Education (OCTAE) – US Department of Education, June, 2016*
- Designed and implemented a three-step registration process for prospective non-Federal discretionary grant reviewers, which includes a self-guided registration form, an online training module titled, *Rating and Documenting Evaluative Feedback for Grant Applications*, and a rating workbook activity – a prerequisite to ensure that selected reviewers have basic competencies to serve in this capacity
 - Hired over 1,100 non-Federal grant reviewers to participate over 67 discretionary grant reviews over a six-year period with a PY 2014-2015 post-review assessment average of 4.85 (1-5 scale). Distributed over \$1.5M in honorariums on time or ahead of schedule.
 - Received all "Exceptional" ratings on the Contractor Performance Assessment Reporting System (CPARS) evaluation for four years in a row
- Provided an alternative virtual WebEx solution to conduct four full-day interactive roundtables at 32 grantee sites across 23 states when in-person convenings were not possible. Significantly reduced expenses while increasing participation from 96 to 285 attendees.

Experience

Project Management/Leadership

- Foster a team environment that focuses on the core values of excellence, agility, accountability and integrity; meeting and exceeding client expectations, creating value and identifying solutions
- Assess project requirements, develop project plans, timelines and budgets, identify milestones, possible risks, project stakeholders, and measures of success
- Manage all aspects of pre-, onsite, and post-event logistics support for convenings based on the client's priorities, expectations and budget. Tasks include developing project plans; designing event branding; designing customized registration sites; identifying, negotiating and securing meeting space and lodging; coordinating AV and meeting space requirements; setting up hybrid in-person/virtual events; developing communication strategy; preparing agendas and meeting materials; name badges, table tents and evaluation tool(s); collaborating with Federal, regional and state staff, partnering with contractor staff, communicating with attendees and presenters, ensuring accessibility needs are addressed; making travel arrangements, providing onsite registration and logistics support, and preparing evaluation summary and executive summary reports.

- Lead the recruitment, selection, hiring and procurement of non-Federal discretionary grant reviewers on behalf of the U.S. Department of Labor (DOL)/Employment and Training Administration (ETA) over a six-year period
 - Designed an online training module titled, *Rating and Documenting Evaluative Feedback for Grant Applications*, in collaboration with ETA staff to describe the role, expectations and responsibilities of non-Federal grant reviewers along with a practice required activity
 - Developed a post-review assessment tool to obtain reviewer feedback from assigned deliberation specialists
- Led the Group TA efforts for the Department of Health and Human Services (HHS), Office of Family Assistance (OFA) Health Profession Opportunity Grants (HPOG) including the 2012 annual grantee meeting, four full-day virtual roundtables, content development, webinars, and a customized grantee website
 - Guided the redesign of a grantee community website and complied with Section 508 standards. Features included access to grantee resources, a calendar of events, program alerts/listserv announcements, archive webinars, and a password protected social media site
- Led the validation efforts for 27 datasets (approx. 6000 records) of the DOL/ETA's communication database on a semi-annual basis – resulting in an increased update rate of 15% over a three-year period
- Led three teams of technical grant reviewers and managed the Youth and Adult Services proposals evaluation process for the Oakland Workforce Investment Board (WIB) on time and within budget

Service Delivery

- Provide performance reporting TA to H-1B Jobs Accelerator (JA), Technical Skills Training (TST) and Make it in America (MIIA) grantees through Office Hours and one-on-one training/troubleshooting
 - Collaborated on a four-part, online tutorial series to introduce new grantee staff to the HUB System used to upload quarterly performance data and narrative files
 - Quarterly performance report submission rate increased to 98%
- Provided TA on an intermediary grantee project including conference planning and logistical support, virtual peer-to-peer forums, coaching, facilitation, and webinars focused on direct services to court-involved or incarcerated youth in high-poverty, high-crime communities

Training and Development

- Designed a national leadership development program, presented courseware, and served in a coaching capacity to over 250 participants (directors, managers, supervisors and staff)
 - Training Topics: *The Five Basic Principles of Leadership, Establishing Performance Expectations, Giving Constructive Feedback, Managing Change, Taking Corrective Action, Coaching for Optimal Performance, Dealing with Emotional Behavior, Developing Job Skills, Recognizing Positive Results, Getting Your Ideas Across, Getting Good Information from Others*
 - Above-average post-test scores over a ten-year period
- Developed content for new employee orientation and supplemental training programs for Financial, Member and Administration Services. Averaged 90% final examination scores over a five-year period.

Customer Service/Quality Assurance

- Provide exceptional customer service to Federal staff, grantees, consultants, conference speakers, subject matter experts, facilitators and team members
- Administered the American Customer Satisfaction Index (ACSI) survey to job seekers and employers. Analyzed data and presented results to Pacific Gateway's WIB. Developed continuous improvement strategies using Baldrige's seven categories for performance excellence based on survey findings.

Employment History

Performance Excellence Partners, LLC, Huntington Beach, CA

2010–Present

Project Management

- Project Manager/Meeting Planner – U.S. Departments of Education and Labor (2014-present)
 - Department of Education (DoED), OCTAE’s Performance Partnership Pilots (P3) 2016 Community-of-Practice Meeting, Juvenile Justice Reentry Education Program (JJREP) 2016 Grantee Meeting and Peer Learning Exchange on Youth Workforce Development and Family Literacy
 - DOL/ETA’s WIOA TA – WIOA Performance Town Hall, Business Town Hall, 2016 WIOA National Convening, 2016 Customer-Centered Design (CCD) The White House Learning Exchange and Celebration (Round 1), and eight (8) in-person meetings for the Advisory Committee on Increasing Competitive Integrated Employment for Individual with Disabilities (ACICIEID) with the Office of Disability Employment Policy’s (ODEP)
 - DOL/ETA’s Office of Regional Management (ORM) – six (6) Workforce Innovation and Opportunity Act (WIOA) Town Halls, two (2) Rapid Response Summits, several State Workforce Administrator (SWA) meetings, Financial Capabilities for Youth Forum, Region 5 Policy Roundtable, and the 2016 Customer Centered Design (CCD) The White House Learning Exchange and Celebration (Round 2)
 - DOL/ETA’s Office of Apprenticeship (OA) Sectors of Excellence in Apprenticeship (SEA) Regional Summits on Healthcare, Advanced Manufacturing, Information Technology, Energy, Transportation and Construction, and the ApprenticeshipUSA Summit at the White House
 - DOL/ETA’s Office of Workforce Investment (OWI) Workforce Innovation Fund (WIF) 2014, 2015 and 2016 Annual Grantee Meetings
 - DOL/ETA’s Office of Unemployment Insurance’s (OUI) Short-Time Compensation (STC) Summit
- Grant Reviewer Panelist Selection, Office of Grants Management, DOL-ETA (2010-present)
- Project Management and Special Projects, Pacific Gateway WDB, Long Beach, CA (2010-present)
- Communications Database Management, DOL-ETA (2010-present)
- Group T/TA and Information Exchange for the HPOG program, HHS-OFA (2012-2013)
- Facilitation of Proposal Evaluation, City of Oakland Workforce Investment Board (2013)
- Online Training for Panelists, Office of Grants Management, DOL-ETA (2011-2012)
- California Awards for Performance Excellence (CAPE) Eureka Application Process, Hollywood WorkSource Center, Hollywood, CA (2012)

Consultant

- TA Performance Reporting, H-1B TST, JA and MIIA Grantees, DOL-ETA (2013-2015)
- TA Coach, High Poverty, High Crime Youth Intermediaries Grant, DOL-ETA (2011-2012)
- Research Analyst, Small Business Partnerships, DOL-ETA (2010-2011)

Bally Total Fitness (BTF), Norwalk, CA

1993–2009

Supervisor of Instructional Development (1997-2009)

- Designed, developed and delivered customized National Service Center (NSC) training programs for 500+ employees providing financial, member and administrative services to over 300 health club facilities
 - Developed courseware for New Hire Orientation training courses including step-by-step instructor guides, participant materials, supervisor materials, learning activities, review packets and testing criteria in collaboration with management staff and trainers.
 - Developed courseware for Supplemental training programs offered weekly to new associates in during their 90-day introductory period - resulting in reduced employee turnover up to 18% in the first three months.

Training Specialist (1993-1997)

- Designed and delivered the NSC's leadership development program. Facilitated and coached more than 250 supervisors and senior-level employees over a 10-year period. Post-test scores above 90%; participant evaluation scores averaged 3.7-3.8.
- Facilitated "Customer Service Starts Here" and "Foundations of Total Fitness" - a company-wide strategic initiative to educate associates on corporate mission, vision and core values as well as guiding principles of fitness. Post-test scores averaged 93%.

Education/Certifications

- B.S., Business Administration – Organizational Leadership emphasis, Corban University, Salem, OR
- Member, Society of Government Meeting Professional
- Certified Professional Coach, CCI
- Certified Baldrige Examiner, California Council for Excellence (CCE)
- Certified Front-Line Leadership Trainer, Zenger Miller/Achieveglobal

Awards/Honors

- Recipient, Outstanding Examiner Award, CCE
- Recipient, Leadership Skills Training Award, American Society for Training and Development (OC-ASTD)

Tressa A. Dorsey (Workforce Development Consultant)

www.tadgrants.com

tressa@tadgrants.com

(916) 899-0038

Expertise & Key Skills

- Developing grants, contracts and policy documents for non-profit organizations
- Program evaluation, compliance and quality assurance
- Training line staff and management in a myriad of workforce development strategies
- Maximizing performance of federally funded programs through coaching and specialized training geared toward exceeding performance measures and outcomes
- Developing partnerships with Department of Corrections, local and state law enforcement agencies and both adult and juvenile probation
- Subject matter expert in Ex-Offender Reentry, programs and strategies
- Proficient with U.S. Department of Labor (DOL), Employment and Training Administration (ETA) Management Information Systems (MIS) data system and reporting

Key Accomplishments

- Subject Matter Expert and Presenter at national conferences including Healthy Marriage and Responsible Fatherhood, Reintegration of Ex-Offenders, Health Professions Opportunity Grants, High Poverty High Crimes and Civic Justice Corps
- Program Manager for DOL Reintegration of Ex-Offenders (RExO)-Generation 1 grant
 - Program was #1 in the nation in retention
- Evaluated and Monitored 6 sub-contractors ensuring compliance, provide findings and assist with corrections
- Trained and coached thousands of workforce development agencies in multiple subject areas
- Developed paid training programs for Adults on Parole to gain skills in their field of interest
- Developed a sustainability and suitability checklist that has been used as a “promising practice” for several DOL RExO programs
- Developed and awarded over \$5million in federal, state and philanthropic funding

Experience

Technical Assistance Coach

- Facilitate trainings for grantees in multiple subject areas on workforce development
- Train grantees in strategic partnership development and policy driven partnerships
- Assist grantees with developing Program Maps for participants and potential partners
- Work with grantees to implement Employer Roundtables to increase job placements for clients
- Identify challenges and promising practices for grantees, develop resources, trainings and case studies with the intent of sustainability and replication

Program Management

- Responsible for developing and monitoring a 2.8 million dollar budget
- Develop strategic plan to promote program mission and ensure sustainability
- Build partnerships and develop Memorandums of Understanding (MOUs) and contracts for sub-contractors and partners
- Develop grants for new funding streams and also renewal applications and proposals for competitive and limited competition grants
- Monitored sub-contractors performance, created findings report and ensured any findings were corrected in a timely manner

Community Resource Development (Corrections)

- Work closely with state prisons, state parole, local jails, and probation to educate staff on resources available for their caseloads
- Ensure Faith and Community Based Organizations (FCBOs) were educated on client's legal requirements
- Act as liaison between corrections staff and FCBO's to better serve the client
- Work directly with Parolees and their families to assist in the transition back to the community

Case Management/Counseling

- Work directly with clients assessing their criminal, drug, medical and mental health histories
- Provide one-to-one and group counseling for individuals with substance abuse issues
- Assess and identify client's needs and develop an IDP
- Work with FCBOs, corrections and families to assist client with goal attainment

Employment Development

- Created an Employment Workshop for Adult Parolees to enhance their ability to gain employment
- Placed Adult Parolees with local employers and within my own organization
- Educated local employers on the benefits to employing individuals in the program
- Worked closely with parole and probation to ensure clients could gain employment with certain companies and hours while still being compliant with parole conditions

Employment History

TAD Grants, Sacramento, California

9/2008–Present

- **Consultant**
 - SME-First Place for Youth
 - SME-Healthy Marriage and Responsible Fatherhood Conference
 - SME-RExO-Generation 3, Social Policy Research
 - SME-Civic Justice Corps (CJC), PEP
 - SME-Garden State Employment and Training Agency
 - SME-National Association of Workforce Development Professionals
 - SME-National Indian and Native American Employment and Training
 - Program Management-Mentally Ill Offender Program, CETES, Inc.
 - Grant Writer-Sacramento Regional Conservation Corps
 - Grant Writer-KRA Corporation
 - Grant Writer-Yuba County Office of Education
 - Grant Writer-Butte County Sheriff's Office
 - Grant Writer-Eckerd/Paxen
 - Grant Writer-Habitat for Humanity Yuba/Sutter
 - Grant Writer-Pasco Hernando Workforce Board
 - OFA/ACF/HHS -Health Professions Opportunity Grant-Technical Assistance Coach
 - US DOL ETA YouthBuild- SME
 - City of Oakland Workforce Investment Board-Grant Panelist Project Lead
 - US DOL ETA RExO, CJC, HPHC-SME
 - Youth Career Connect-SME Youth Mentoring
 - Make it in America-Technical Assistance Lead
 - Ready to Work-Technical Assistance Lead
 - Pacific Gateway-Monitoring, Employer Engagement
 - Employment and Training Administration-WIOA Training and Implementation
 - Office of Apprenticeship-Sectors of Excellence in Apprenticeship

MAAP, Inc., Sacramento, California

9/2006–9/2011

- **Program Manager, Reintegration of Ex-Offenders Generation 1 (PRI)**

Education/Certifications

- Criminal Justice-Western International University 2006

Awards/Honors

- 2009-Certificate of Appreciation-NINAETC
- 2007-Champions of Compassion, U.S. DOL White House Office of Faith Based and Community Initiatives
- 2005-Certificate of Appreciation-California Department of Corrections and Rehabilitation for Outstanding Community Resource Development

Tanya Alvarez Khorram, M.B.A. (Researcher/Writer I)

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tanya_c_alvarez@yahoo.com

202-321-7183

Expertise & Key Skills

- Conduct and lead numerous training and webinar workshops for potential and current California Awards for Performance Excellence (CAPE) Examiners
- Provide collaborate efforts to organizations during their Baldrige journey through CAPE application coaching, writing, and technical assistance
- Knowledge in managing city, state and Federally-funded workforce development grants (foundation and government)

Key Accomplishments

- Edited and updated all CAPE 2013 training materials for new and returning Examiners
- Malcolm Baldrige National Quality Award Examiner (2012, 2013); California Awards for Performance Excellence Training Chair (2012, 2011); Certified California Awards for Performance Excellence Senior Examiner (2012, 2011, 2010); Certified California Awards for Performance Excellence Senior Examiner In-Training (2010); Certified California Awards for Performance Excellence Examiner (2009)
- Provide professional coaching, career guidance and case management for workforce development programs
- Developed new business materials and supported ongoing marketing efforts and coordinated multimedia, event, seminar, business conference and meeting calendars for domestic and international clients in the areas of government and trade relations, coalition building and strategic communications.

Experience

Business Development Experience

- Consult and assist a variety of business owners to create and achieve their organizational goals through brand and strategy development; social media, marketing, e-commerce services and continuous quality improvement program implementation (Malcolm Baldrige National Quality Award and the California Awards for Performance Excellence (CAPE))
- Manage city, state and Federally-funded workforce development grants (foundation and government)
- Responsible for eligibility assessment, data retention and grant compliance. Collaborated and assisted with reading, researching, writing and assembling foundation and government grant proposals. Provided professional coaching, career guidance, case management and follow-up services and developed employment opportunities with private and public sector employers

California Council for Excellence Training Chair and Senior Examiner Experience

- Conduct and lead numerous training and webinar workshops for potential and current California Awards for Performance Excellence (CAPE) Examiners. Trainings include new examiner orientation, examiner training, comment writing, consensus process, and site visit preparations
- Provide collaborate efforts to organizations during their Baldrige journey through CAPE application coaching, writing, and technical assistance

Workforce Development Experience

- Managed city, state and federally funded workforce development grants (foundation and government)
- Worked closely with at-risk youth to overcome a multitude of barriers to employment
- Conducted pre-employment training for youth and adult candidates

Social Media Experience

- Founded, administer and manage a highly interactive Facebook group with over 11,000 Members from all over the world and its four sub-groups with a combined total of 5,000 Members.

Federal Legislative Experience

- Researching, analyzing and tracking a broad range of legislative issues for domestic and international clients, covering hearings on Capitol Hill and attending client meetings.
- Monitoring daily media coverage, developing comprehensive media database and covering hearings on Capitol Hill for domestic and international clients.

Administrative Experience

- Schedule appointments, prepared meeting agendas and set up nationally attended conference calls.
- Drafting legislative responses, developed constituent database and assisted both Chief of Staff and various Legislative Assistants with administrative functions

Employment History

TAKtical Services, Marina del Rey, California 2011–Present

Consultant

- Consult and assist small businesses in creating and achieving their business goals through brand and strategy development; social media and marketing services; continuous quality improvement implementation and research.

Performance Excellence Partners, Inc. (PEP), Huntington Beach, California 2013

Writer/Consultant

- Led team of proposal reviewers and presented results to the Oakland Workforce Investment Board
- Wrote a CAPE application on behalf of a local workforce development agency, which received the coveted Eureka “Silver” award

Community Career Development, Inc., Los Angeles, California 2007–2010

- Business Development Associate / Program Manager for numerous state and federally funded workforce development grants (foundation and government)

BKSH & Associates, Washington, DC 2000–2007

- Associate, 2006-2007
- Client Executive, 2001-2006
- Support Staff, 2000-2001

Education/Certifications

- Master’s in Business Administration – Marymount University, Arlington VA, May 2004
- BA in Communications (Emphasis in Public Relations)- Marymount University, Arlington VA, May 2000
- Leaders of Learning Certification – HarvardX (completion May 16)
- Malcolm Baldrige National Quality Award Examiner (2012, 2013)
- California Awards for Performance Excellence Training Chair (2012, 2011)
- Certified California Awards for Performance Excellence Senior Examiner (2012, 2011, 2010)
- Certified California Awards for Performance Excellence Senior Examiner In-Training (2010)
- Certified California Awards for Performance Excellence Examiner (2009)

Carrie A. Thorne (Project Analyst)

Performance Excellence Partners, LLC cthorne@performexcel.com Office Phone: (714) 374-1140

Expertise & Key Skills

- **Project Management.** An experienced project manager, focused on bringing projects in on time, within budget, and with early adopters. Expertise in status reporting, budget forecasting, escalation of issues, risks and mitigations, as well as skilled in managing consultants, contractors, and project resources.
- **Training & Development.** Skilled at performing needs assessments, designing employee and organization training/development solutions, instructional design and customization, training delivery, facilitation and overall implementation of development solutions, followed with evaluation measures. Significant experience in the overall management of training programs and curriculum.
- **Organizational Change Management (OCM).** Expertise in designing and implementing OCM strategies and plans for large projects with deliverables focusing on communication, training, and stakeholder involvement plans that ensure user buy-in, readiness and successful implementation.

Key Accomplishments

- Strategic planning and technical assistance to workforce grantees for the City of Los Angeles. Consultation support to the Los Angeles Performance Partnership Pilot that included the development of the program's strategic plan by assisting the facilitation of workshops, with multiple stakeholders that allowed for meaningful buy-in and partnerships to be strengthened.
- Managed the development and implementation of the OCM competency for Southern California Edison. Key deliverables included: Customized change management curriculum for all levels of employees (including a certification program for practitioners). Leadership and redesign of an OCM Network consisting of over 20 internal practitioners across the organization, which allowed for integration, knowledge management and sharing. Centralization and standardization of the company's 8-step OCM Methodology, which included practical tools and templates
- Led the large scale OCM effort for the implementation of 3 enterprise services and technologies: Enterprise Portal, Identity Management and Enterprise Application Integration. Results indicated increased awareness and understanding of change impacts and signs of early adopters.
- Led the OCM effort for the technical upgrade to PeopleSoft. Key deliverables included: establishment of development of formalized structure, Business Readiness Network, that involved 70 key stakeholders from all levels of management across the organization. Monthly newsletters, online team rooms, online learning courses, instructor led classroom training delivery and follow-up resources on the company's intranet for 500 users. Designed follow-up strategy to ensure on-going support, education, sustainability and the delivery of appropriate awards and recognition. Deliverables resulted in user readiness and mitigation of negative resistance to change.
- Managed company-wide Equal Opportunity and Diversity Training initiative that was completed on time and under budget for 13,000 employees. Reduced costs by establishing increased commitment and development of fifty internal facilitators as well as overhauling administrative processes.

Experience

Organizational Change Project Management & Development Consulting Services

- Experience with local and federal contracting, providing project support to workforce grantees.

- 8 years with Southern California Edison, a leader in the energy industry, as a key project manager and consultant to leadership in the areas of people management, including change management, training and development, leadership development, project management, selection and assessment.
- Over 10 years' experience leading and chairing events in the community, including PTA book fairs, family ministry events at a local church, coordinating volunteers and communicating with stakeholders, representing public education at school site council meetings and superintendent forums, and advising leaders on implementing change.
- IT implementation experience with Enterprise Architecture, PeopleSoft and other HR systems.

Employment History

Performance Excellence Partners, LLC, Huntington Beach, California 2016–Present

- **Business and Project Analyst**

- Provide analytical and consulting support on human capital projects to PEP, LLC, a professional services firm and federal contractor, to ensure optimal objectives are met. Currently providing strategic planning support to the City of Los Angeles and the Performance Partnership Pilot. Providing technical assistance to the workforce grantees by facilitating stakeholder engagements and ensuring project success.
- Develop PEP's business pipeline by assessing federal and local contracting opportunities to determine bid/no bid decisions.

Homemaker/Community Volunteer

2006–2016

- Took time to be a stay-at-home mom and raise my children. Volunteered my time at church, school PTA and Foundation events, and in youth sports where I used my project management and communication skills to lead events.

Southern California Edison, Rosemead, California

1998–2006

- **Project Manager, Enterprise Change Office**

- Designed and implemented organization change management (OCM) strategies for enterprise change projects. Managed the development and standardization of the OCM capability for the company. Provided ongoing consultation and facilitation to meet client needs.
- Assisted with the start-up of an Enterprise Change Office by developing the organization's two-year strategic document, identifying staffing needs of change projects, hiring, onboarding, training and managing senior OCM Consultants. Immediate results included the inclusion of staff in key change projects.
- Managed the development and implementation of the OCM competency for the company.
- Developed and implemented an OCM plan for changes caused by the update to the Fair Labor Standards Act.

- **Project Manager, IT People & Change Management**

- Designed and implemented OCM strategies and plans for large scale Enterprise Architecture projects, including Enterprise Portal, Identity Management and Enterprise Application Integration, with deliverables focusing on communication, training and involvement plans that ensured user readiness and successful implementation. Built the competency of OCM throughout IT.
- Managed a \$480k budget and a detailed project plan built around SCE's 8-step OCM methodology. Provided weekly status reports, including escalation of issues/risks/mitigations. Managed the execution and prioritization of deliverables through a team of four OCM professionals. Supported six managers and project managers simultaneously in the endeavor.
- Executed a multi-layer communication plan that included a series of iterative walk-n-talk packages, robust web site, newsletter and email articles, and talking points for management to disperse upward.

- Deployed an OCM strategy in partnership with Corporate Communications and HR for the release of an Employee Portal to 500 users that resulted in engaged and prepared pilot users.
- Assessed pulse on a regular basis to ensure movement to the change destination. Implemented interventions, such as educational sessions, follow up communication, focus group / brainstorming sessions, and recognition events to address pain points and increase supporters.
- **Human Resources Consultant, Employee & Organization Development**
 - Provided strategic consulting and program/project management in the areas of organization development, including change management, to all levels of management across the company. Performed needs assessments, employee and organization training/development recommendations, instructional design and customization, training delivery, facilitation and the development and execution of project plans. Managed a \$370,000 budget.
 - Development and implementation of communication strategies that met the needs of various audiences. Monthly newsletters, online team rooms, information presentations and targeted emails resulted.
 - Directed end user training strategies to include online learning, instructor-led training and follow-behind job aides.
 - Designed follow-up strategies to change projects to ensure on-going support, education, sustainability and the delivery of appropriate awards and recognition.
 - Built, marketed, and monitored soft skills catalog course offerings by partnering with outside vendors to deliver targeted training and learning solutions to clients. Partnered with UC Irvine to streamline the project management training curriculum and application.
 - Managed the company's new employee orientation program. Redesigned the program to integrate the new hire process across functions as well as to be more focused on welcoming and assimilating people into our organization.
- **Human Resources Consultant, Performance Assessment Services**
 - Provided professional consulting services to business clients, including senior management, on selection and assessment issues. Provided recommendations in areas of test policy, hiring decisions, training needs, selection strategies, and program evaluations.
 - Created assessment and diagnostic tools including resume screening matrices, customized competency based dimensional interviews, case study analyses, role play exercises, job simulations, skills inventories, assessment centers, and technical inventories.
 - Performed job analysis studies and job assessments through conducting job observations, meetings with SMEs, facilitating focus groups, interviews, and through survey analysis.
 - Conducted client satisfaction survey projects that had department wide impact.
 - Led the selection process for the Executive Leadership Development Cross-Training Program. Consulted with executives and senior management on the selection results for their candidate pools. Provided written and oral feedback to participants.

Education/Certifications

- Master of Science (M.S.), Industrial & Organizational Psychology (CSU San Bernardino), 2000.
- Bachelor of Arts (B.A.), Psychology; Minor Business Administration (CSU San Bernardino), 1997
- Project Management Certificate – progress towards (UC Irvine), 2003
- Organization Change Management Methodology Training (SCE), 2004
- Implementation Management Associates Accelerating Implementation Methodology OCM Training, 2003

Jaime A. Ramirez (Organization Effectiveness Consultant)

Performance Excellence Partners, LLC | jramirez@performexcel.com | Office Phone: (714) 374-1140

Expertise & Key Skills

- **Organization Effectiveness (OE).** An experienced management and organization effectiveness consultant, proficient at partnering and building relationships with clients to facilitate performance improvement results. Expertise in advising leadership; assessing performance gaps; developing and implementing performance improvement strategies; facilitating teams; coaching leaders, managers and employees; and action plan implementation.
- **Organizational Change Management.** Expertise in advising leaders and organizations in implementing enterprise-wide solutions that drive change. Proficient at assessing the business and people impacts of change and designing and implementing strategies to mitigate impacts, including implementation plans, communication plans, user adoption efforts, and other business readiness solutions.
- **Training & Development.** A proficient curriculum designer, trainer, and facilitator for business and professional development programs including management/leadership development, talent management, career development, knowledge management, teamwork, conflict management, interpersonal communication, and more.

Key Accomplishments

- Provide management oversight and advisory services to PEP's staff for the Strategic Petroleum Reserve Project Management Office (SPRPMO) support services project, a multi-year, multimillion dollar federal contract with the U.S. Department of Energy. PEP's team continues to provide strategic program and project management support with excellent customer satisfaction ratings, including financial and budget, information technology, project scheduling, occupational safety, site security, and administrative services.
- Partnered with U.S. Department of Labor, Employment & Training Administration, Office of Workforce Investment (OWI) to design and implement a customized organizational and team effectiveness assessment, analyze and interpret assessment results, facilitate debrief and action-planning sessions with five divisions, and recommend improvement strategies that support operational effectiveness according to industry best practices and OWI's unique operational implications.
- Partnered with the U.S. Department of Health & Human Services to design and implement an enhanced grantee community website, as well as a new social media software tool. Using a phased IT project management and change management implementation approach, realistic timelines, IT requirements, and organizational and grantee impacts / benefits were identified to facilitate the installation of the software within a Microsoft SharePoint environment. The social media tool offered additional communication and collaboration tools for grantees dispersed across the U.S., supporting reduced travel budgets for in-person meetings and enhanced knowledge sharing across the community.
- Led the development and delivery of professional training services for the U.S. Department of Labor (DOL), Office of the Assistant Secretary for Administration and Management. Delivered professional development training to managers and employees across the entire DOL enterprise, including all Regional Offices.

Experience

Organizational Leadership & Performance Consulting Services

- More than 20 years of experience providing Management and Organization Effectiveness consulting services to clients in the Federal, private, and non-profit sectors. Expert leadership and team facilitator, coach, and organizational consultant. Excellent ability to partner with clients.
- An Industrial and Organizational Psychologist with experience and capability in the areas of organizational performance assessments; facilitation of boards and project teams; design and implementation of performance improvement plans and processes; and evaluation of organizational, leadership, team, project, and individual performance improvement efforts.
- Significant experience consulting with Federal and local government clients, including the U.S. Department of Energy, U.S. Department of Labor, U.S. Department of Health & Human Services, City of Long Beach, CA, and the City of Los Angeles, CA, in the areas of leadership and team effectiveness, workforce development, grant programs, performance improvement, program management, and talent management.
- Over eight years with Edison International, Southern California Edison, a leader in the energy industry, as a trusted advisor to leadership in the areas of management and team effectiveness, project management, change management, leadership development, business process improvement, and training.
- IT implementation experience with Enterprise Resource Portfolios (ERP), including SAP's HR/talent management modules, business process improvement, and change management; implementation of an enterprise-wide, multi-phase smart meter effort; the implementation of a multi-module, multi-phase social media software platform.

Employment History

Performance Excellence Partners, LLC, Huntington Beach, California 2012–Present

- **Vice President**
 - Oversees internal operations for PEP, LLC, a professional services firm and federal contractor, to ensure operational performance is optimized through effective business processes, systems and talent management.
 - Provides management oversight to key projects and staff, as well as direct consulting services to customers to facilitate organization, leadership, and project objectives. Currently supporting federal agency projects for the U.S. Department of Labor, City of Los Angeles, and the U.S. Coast Guard.

Southern California Edison, Rosemead, California 2003–2012

- **Senior Organization Development Consultant**
 - Supported enterprise-wide initiatives as the assigned Organization Effectiveness/Change Management lead; partnered and collaborated with business unit management to effectively meet the needs of each initiative and the company; facilitated integration of OE and change initiatives and insured linkage with company and business unit strategy.
 - Managed and delivered various training programs, including leadership development, sexual harassment prevention, management certifications, and leadership grants; managed the design, redesign, piloting, implementation, and evaluation of new and existing development programs; managed vendor selection process, performance of vendor consultants, and vendor purchase orders/contracts; managed program budgets to ensure proper allocations for each fiscal year.

Vantage Human Resource Services, Inc., Arlington, Virginia 1999–2003

- **Senior Organization Development Specialist & Trainer**

- Supervised client-project team members and provided direct services to achieve client organization development/training & development goals; managed the training function for client organization with a population of approximately 16,000 employees, 2,600 managers, twelve major business units, and ten geographical regions.
- Designed and delivered training programs on topics such as management, leadership, communication, conflict management, coaching, empowerment, teams, performance management, negotiating, and presentation skills; conducted needs assessments via interviews / surveys; assessed work groups and provided customized interventions, including team analysis, team building, and strategic planning.

Indiana University, Professional Development Center, Indiana **1998-1999**

• **Program Associate / Facilitator**

- Designed and facilitated adventure-based team and leadership development initiatives for corporate, university, and community clients; developed training content and provided logistics coordination; supported internal development of office with needs assessments, database design/management, client feedback instruments, grant research, and account management of clients.

City of Long Beach, California **1997-1998**

• **Organization Development Consultant**

- Provided organization development and technical services to the City of Long Beach One-Stop Center; conducted focus groups and interviews to assess organizational needs regarding intake processes; reviewed, revised, and created new electronic forms for staff as determined by needs assessment; provided technical end-user training; project contributed to a more streamlined client intake process overall.

HayGroup, Los Angeles, California **1997-1997**

• **Technical Associate**

- Provided technical and human resource consulting services to clients from a wide variety of industries, including world communications, auto manufacturing, and aerospace; provided survey and compensation data analysis, database design & development, and focus group research; conducted extensive work on employee attitude survey research projects involving survey design, MS Access database design and development, and report design and generation; provided day-to-day project management of clients.

Career Transition Center, Long Beach, California **1994-1997**

• **Training & Employment Specialist**

- Under grant funding from the U.S. Department of Labor, Job Training Partnership Act (JTPA), Long Beach One-Stop Center, provided career coaching and coordinated the retraining / reemployment of clients; assessed client knowledge, skills, and abilities; developed and recommended training and reemployment strategies; partnered and built strategic relationships with external training vendors; evaluated performance of vendors.

Richard Chang Associates, Irvine, California **1994-1994**

• **Organization Development Associate**

- Supported client organization development projects; interviewed and surveyed client customers for indicators of satisfaction. Conducted statistical analysis of data and provided interpretation of results; promoted company in annual American Society for Training and Development Conference.

Education/Certifications

- Master of Arts (M.A.), Industrial & Organizational Psychology (CSU Long Beach), 1997
- Bachelor of Arts (B.A.), Psychology (CSU Fullerton), 1993

- Graduate, Goldman Sachs 10K Small Business Program, 2015
- Certified Coach, the John Maxwell Team, 2012
- Project Management Certificate (Project Management Institute), 2010
- Human Performance Improvement Certificate (American Society of Training & Development), 2005
- Organization Change Management (Edison internal), 2005
- Diversity Facilitator, Train-the-Trainer (Edison internal), 2004
- PROFILOR Certification (Personnel Decisions International), 2003
- Government Contracting (George Washington University, Law School), 2001
- Train-the-Trainer (American Management Association), 2000

Kathy Cullen (Graphics Specialist)

Performance Excellence Partners, LLC

mkcullen61@gmail.com

Phone: (410) 489-9316

Expertise & Key Skills

- Designing appealing layouts and graphics for reports, brochures, newsletters, fact sheets, posters, presentations, and marketing and outreach materials.
- Typing, formatting, proofreading, and ensuring document conformance to standards and specifications.
- Proposal preparation, including typing and formatting text and tables, creating charts and graphics, designing covers and divider pages.
- Proficient in Adobe CS6 (InDesign, Illustrator, Photoshop, Acrobat X Pro), and MS Office 2010 (Word, PowerPoint, Excel).

Key Accomplishments

- Designed fast-turnaround layout options for meeting materials (name badges, folder labels, and letterhead) and registration websites that were well-received by clients.
- Worked with PEP Senior Project Director to design and prepare the 'Diversity and Inclusion Implementation Plan' for the U.S. Department of Energy's (DOE's) Office of Nuclear Energy. Client said the process and the final product exceeded her expectations.
- Designed cover and page layout and prepared 2013 Program Plan for DOE's Office of International Nuclear Energy Policy and Cooperation.
- Created templates for Health Profession Opportunity Grants (HPOG) Program Maps and Career Pathways; formatted 32 Program Maps and Grantee Questionnaires; prepared 508-compliant pdfs for uploading on HPOG web site.
- Designed cover and page layout and prepared 200-page document, *CBRN Respiratory Protection Handbook*, for U.S. Department of Health and Human Services.

Experience

Designing Marketing and Outreach Materials

- Created cover design and page layout for the U.S. Army Corps of Engineers 2011 Annual Financial Report.
- Worked with a team consisting of clients and exhibit vendors to design and fabricate a 20 ft. exhibit for the U.S. Department of Energy's Office of Fossil Energy.
- Created cover designs for family of seven Annual Reports for the National Institute of Standards and Technology; supervised layout and production of the seven Annual Reports.
- Designed 'Energy Science & Education' workshop logo and accompanying materials for U.S. Department of Agriculture's Research, Education, and Economics Division.
- Prepared a wide variety of graphics for use in Environmental Impact Statements, Environmental Assessments, Base Closure Studies and other documents for DoD and EPA clients.

Proposal Preparation

- Supported numerous proposal efforts for submittal to various offices within the U.S. Department of Energy, U.S. Department of Homeland Security and other Federal agencies.
- Proposal preparation included typing, formatting, proofreading, creating illustrations and designing proposal covers.
- Prepared pdfs for electronic submittal; prepared CDs for submittal when required.
- Assisted with production of hard copy proposals, including assembling notebooks and GBC-binding of documents, inserting covers, spines, and tabs and packaging for shipping and/or delivery.

Administrative

- Prepared official correspondence, responses to suspense reports, and Officer Evaluation Reports.
- Coordinated CONUS and overseas travel and obtained theater clearances for personnel traveling overseas.
- Prepared presentation materials, including overheads and other visual aids.
- Supervised front desk activities (phones, faxes, mail distribution, tracking/ordering office supplies) and supported front desk activities as needed.

Employment History

Performance Excellence Partners LLC (PEP), Huntington Beach, CA 2011–Present

- **Graphic Designer/Desktop Publisher**
 - Design and prepare a variety of documents and graphics for U.S. Department of Energy, U.S. Department of Health and Human Services, and U.S. Department of Labor.
 - Create PEP marketing and outreach materials and support PEP proposal efforts.

IBM Global Business Services, Gaithersburg, MD 2010–2011

- **Graphics/Publications Specialist**
 - Designed brochures, posters, cd labels and a wide variety of graphics in support of IBM and IBM clients.
 - Assisted in proposal preparation.

Technology & Management Services, Inc. (TMS), Gaithersburg, MD 1996–2010

- **Graphics/Desktop Publisher**
 - Designed brochures, tri-folds, and gatefolds for the U.S. Department of Energy's (DOE) National Energy Technology Laboratory.
 - Designed exhibit panels and posters for DOE's Office of Fossil Energy, Office of Carbon Sequestration and Office of Clean Coal.
 - Created exhibit and conference materials including panels, banners, handout materials, and cd/dvd labels and jackets.

Sherikon, Inc., Frederick, MD 1993–1996

- **Executive Assistant**
 - Performed duties of administrative assistant to the Director of the Army Telemedicine Office at Fort Detrick, MD.
 - Promoted to Executive Assistant after six months of providing admin and front desk support.

Halliburton NUS Environmental Corporation, Gaithersburg, MD 1987–1993

- **Graphic Artist**
 - Designed fact sheet template for Portsmouth Naval Shipyard.
 - Prepared a wide variety of graphics for use in Environmental Impact Statements, Environmental Assessments, Base Closure Studies and other reports prepared by NUS for clients such as DoD and EPA.
 - Supported NUS proposal preparation, including typing, formatting, proofreading, creating graphics, cover design and copying/binding/packaging.

Education/Certifications

- HS Diploma – Glenelg High School, Glenelg, MD
- Ongoing education classes and training related to graphic design and desktop publishing.

Board of Directors – Not Applicable

PEP is a Limited Liability Company with Rachel Emily Ramirez as the President & CEO and sole Managing Member.

WIOA - WORK EXPERIENCE - 225

Last Name	First Name	File Number	PPE 3/17/2017		PPE 3/31/2017		CUMULATIVES	
			PAID 4/14/2017		PAID 4/14/2017		Hours	Wages
			Reg Hours	Wages (\$10.50 Hr)	Reg Hours	Wages (\$10.50 Hr)		
Alvarado	Daisy	229859		\$ -	23.50	\$ 246.75	80.25	\$ 842.63
Atwood	Shanay	229860		\$ -	11.50	\$ 120.75	64.50	\$ 677.25
Bates	Lauren	229213		\$ -	25.00	\$ 262.50	85.50	\$ 897.75
Barua	Aishi	229795		\$ -	25.00	\$ 262.50	116.50	\$ 1,223.25
Barua	Srijonee	229796		\$ -	14.00	\$ 147.00	122.00	\$ 1,281.00
Bell	Makayla	229616		\$ -	5.00	\$ 52.50	16.00	\$ 168.00
Garcia-Alcala	Leticia	229886		\$ -	20.25	\$ 212.63	95.50	\$ 1,002.75
Limon	Maria	229812		\$ -	35.00	\$ 367.50	252.00	\$ 2,646.00
Moore	Semaj L	229839		\$ -	35.00	\$ 367.50	122.00	\$ 1,281.00
Pierce	Georniqwa	229889	21.75	\$ 228.38	46.00	\$ 483.00	94.00	\$ 987.00
Ramos	Matthew	229838		\$ -	51.00	\$ 535.50	194.50	\$ 2,042.25
Rodriguez	Ayllen	229952		\$ -	20.00	\$ 210.00	20.00	\$ 210.00
Romero-Serrano	Yamilexy	229805	6.00	\$ 63.00	9.00	\$ 94.50	81.50	\$ 855.75
Simmons	Dymond N	229841	6.75	\$ 70.88	57.00	\$ 598.50	136.00	\$ 1,428.00
Tafolla	Maria	229870		\$ -	50.00	\$ 525.00	137.25	\$ 1,441.13
Tang	Amy	229857		\$ -	40.00	\$ 420.00	99.50	\$ 1,044.75
Villapudua	Alegandrina	229888		\$ -	66.00	\$ 693.00	158.75	\$ 1,666.88
Williamson	Shontera	229868		\$ -	80.00	\$ 840.00	121.00	\$ 1,270.50
				\$ -		\$ -	0.00	\$ -
TOTALS			34.50	\$ 362.25	613.25	\$ 6,439.13	3895.75	\$ 43,696.00
			3.00		11.00		46.00	

	Subobject	Hours	Amount	Hours	Amount	Hours	Amount
	215002	34.50	\$ 362.25	613.25	\$ 6,439.13		\$ 43,696.00
FICA 6.2%	215004		\$ 22.46		\$ 399.23		\$ 175.79
MEDICARE 1.45%	215004		\$ 5.25		\$ 93.37		\$ 41.11
TOTAL WIRE			\$ 389.96		\$ 6,931.73		\$ 43,912.90



City of Long Beach

Department of Financial Management
Purchasing Division
333 W Ocean Blvd. 7th floor, Long Beach, California 90802
p 562.570.6200

March 2, 2017

NOTICE TO PROPOSERS

ADDENDUM NO. 1: Q & A

RFP No. EP 17-051

Workforce Development Services/Subject Matter Experts

This addendum changes and supersedes the language in the original RFP. Please acknowledge receipt of this addendum by signing and submitting with your proposals. Any proposer who fails to submit this addendum may be disqualified.

The questions and answers are as follows:

1. Q: Is there a page limit for the technical proposal?
A: No.
2. Q: Is there a pre-established scoring criteria associated with the criteria listed in Section 5.1 (page 10)?
A: No, proposals will be reviewed in accordance with the criteria as stipulated in Section 5.1.
3. Q: Section 4.3, Method of Submission – please provide any file size and file type restrictions. Please confirm that a PDF file for the narrative/technical and the cost proposals is appropriate.
A: Each file must not exceed 50MB and there's no file type restriction; however, the City prefers PDF files.
4. Q: Section 4.10 (page 9) states that proposals shall be submitted in two (2) parts – the narrative/technical proposal and the cost proposal. Please clarify whether the documents included in the submission checklist (Attachments A, C-I as well as the other attachments listed), are to be included in the narrative/technical proposal volume.
A: Attachments A-I can be uploaded separately on the general attachments tab.

Addendum #1 – RFP No. EP 17-051

5. Q: Section 9.1, Financial Stability (page 12) – in lieu of submitting financial statements, may the contractor provide a link to their financials in order to keep control of the file size?
- A: The financial statements should be submitted with the proposal. The system will allow 50MB for each file.
6. Q: Section 12.22 (page 18) – the RFP states that payment will be on a cost reimbursement basis. Please confirm that the contractor should prepare their proposal on a time and materials basis.
- A: Please refer to Appendix B on how contractor should prepare the cost proposal. Regarding materials costs, please refer to answer to Question #8 and Question #13.
7. Q: On Appendix B, Cost proposal, there is only one column for rates. However, in Section 3.4, Service Levels (page 5), period of performance may be renewed on an annual basis for 2 additional years.
- a. Will there be an amended Appendix B with 2 additional columns for those option periods
- b. Should Contractor add those 2 additional columns?
- c. Should Contractor just note rate escalation should renewal occur in those additional 2 years?
- A: Proposed cost must be valid for the duration of the contract, including the two possible additional renewals, for a total of 48 months.
8. Q: In the cost proposal, if we have a catalog off the shelf product, do we include the product(s) under the job title column and the cost per license under the rate per hour column (Referencing the form named Attachment B)?
- A: Yes. For costs that are not related to staffing or cost per hour, you may put a note under the rate to clarify the quantity or unit (per module, per year, etc.)
9. Q: We offer bulk discounts on our products, how would you like us to show bulk discounts?
- A: Please see answer to Question #8.
10. Q: Are you expecting separate proposals for each service category, meaning each with its own scope of the project, company background and references, and cost?
- a. If separate, should each proposal be submitted separately or as one packaged file?

Addendum #1 – RFP No. EP 17-051

A: Only one proposal is required for this RFP. If you are applying for more than one category, you should list those categories when answering Question #1 of Appendix A (Narrative/Technical Proposal).

11. Q: Is there a page limit for the proposal(s)?

A: No.

12. Q: As projects are identified, will there be an RFP process specific to each identified project in which approved vendors will be able to refine scope of work and cost proposals.

A: Yes.

13. Q: Appendix B / Cost Proposal: Since the Cost Proposal is only requesting Job Title/Functions and Rates Per Hour for SMEs, will the pricing for materials, such as making copies or meeting costs, be requested as individual projects?

A: All additional expenses related to the services may be discussed and negotiated separately, after conclusion of the RFP process and prior to awarding the contract.

14. Q: What is the anticipated funding allocation for each Service Category in Section 3.5?

A: There is no anticipated funding allocation for each Service Category, as this RFP would primarily establish a list of qualified vendors for future projects. Actual funding will be on as-needed basis, subject to funding availability.

15. Q: Which of the service categories includes OJT and/or IWT?

A: Workforce Intermediary. Additionally, miscategorization of subject category area will NOT result in disqualification.

16. Q: Does this include Maintenance and Reliability Training in this RFP or would it be separate?

A: Please include in Workforce Intermediary.

17. Q: We have not had any government contracts. How should we address the reference requirement? We are affiliated with a reputable, well recognized non profit that may also not have had government contracts, if that helps.

A: If you have performed similar projects (service categories you are applying for), for those references, you may list those as reference and the Review Team will determine if sufficient or comparable.

18. Q: Do proposers need to apply for a business license prior to submitting a proposal?

A: Proposer can apply for a business license after notice of award.

Addendum #1 – RFP No. EP 17-051

19. Q: Does the proposer need to include the business license in the proposal?

A: No.

PREPARED BY: Sokunthea Kol, Buyer I

ACKNOWLEDGED BY: Performance Excellence Partners, LLC
Company Name

Rachel E. Ramirez
Print Name

President & CEO
Title

Rachel E. Ramirez
Signature

3/7/2017
Date



APPENDIX B: COST PROPOSAL

Performance Excellence Partners proposes the following Hourly Rates for each of the Positions included in our proposal.

Position Job Title	Hourly Rate
Project Manager II	\$75
Project Analyst	\$60
Researcher/Writer I	\$60
Workforce Development Consultant	\$100
Organization Effectiveness Consultant	\$125
Administrative/Clerical I	\$35
Graphics Specialist	\$50



ATTACHMENT A: CERTIFICATION OF COMPLIANCE WITH THE TERMS AND CONDITIONS



City of Long Beach
Purchasing Division
333 West Ocean Boulevard, 7th Floor
Long Beach, CA 90802

Attachment A

**CERTIFICATION OF COMPLIANCE WITH
TERMS AND CONDITIONS OF RFP**

I have read, understand and agree to comply with the terms and conditions specified in this Request for Proposal. Any exceptions MUST be documented.

SIGNATURE *Rachelle K. Manning*

EXCEPTIONS: Attach additional sheets if necessary. Please use this format.

EXCEPTION SUMMARY FORM

RFP SECTION NUMBER	RFP PAGE NUMBER	EXCEPTION (PROVIDE A DETAILED EXPLANATION)

ATTACHMENT C: STATEMENT OF NON-COLLUSION



City of Long Beach
Purchasing Division
333 West Ocean Boulevard, 7th Floor
Long Beach, CA 90802

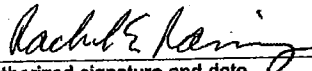
Attachment C

Statement of Non-collusion

The proposal is submitted as a firm and fixed request valid and open for 180 days from the submission deadline.

This proposal is genuine, and not sham or collusive, nor made in the interest or in behalf of any person not herein named; the proposer has not directly or indirectly induced or solicited any other proposer to put in a sham proposal and the proposer has not in any manner sought by collusion to secure for himself or herself an advantage over any other proposer.

In addition, this organization and its members are not now and will not in the future be engaged in any activity resulting in a conflict of interest, real or apparent, in the selection, award, or administration of a subcontract.

 March 14, 2017
Authorized signature and date

Rachel E. Ramirez President & CEO
Print Name & Title

ATTACHMENT D: DEBARMENT, SUSPENSION, INELIGIBILITY CERTIFICATION



City of Long Beach
Purchasing Division
333 West Ocean Boulevard, 7th Floor
Long Beach, CA 90802

Attachment D

Debarment, Suspension, Ineligibility and Voluntary Exclusion Certification

Please read Acceptance of Certification and Instructions for Certification before completing

As a current or potential vendor for the City of Long Beach (City) your firm, through its business relationship with the City, may be the recipient of federal grant funds. As such, the City is required to document that neither your business entity or organization, nor any of your principals are debarred, suspended, ineligible, or have voluntarily been excluded from receiving federal grant funds. Consistent with Executive Order No. 12549 Title 2 CFR Part 180 Subpart C, all potential recipients of federal grant funds are required to comply with the requirements specified below. By submission of proposal/bid/agreement, the undersigned, under penalty of perjury, certifies that the participant, nor any of its principals in the capacity of owner, director, partner, officer, manager, or other person with substantial influence in the development or outcome of a covered transaction, whether or not employed by the participant:

- Are not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any Federal department or agency;
- Have not, within a three (3) year period preceding this bid/agreement/proposal, been suspended, debarred, voluntarily excluded or declared ineligible by a federal agency;
- Do not presently have a proposed debarment proceeding pending;
- Have not, within a three (3) year period preceding this bid/agreement/proposal, been indicted or convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct;
- Have not, within a three (3) year period preceding this bid/agreement/proposal, had one or more public transactions (Federal, State, or local) terminated for cause or default.

If reorganization, management turnover, or a shift or change of principals' status occurs, written notice must be submitted within 21 days. Subsequent disclosure of unfavorable information will be subject to thorough review and remedial action. Updated versions of this certification may be requested on a routine basis.

Where the potential prospective recipient of Federal assistance funds is unable to certify to any of the statement in this certification, such prospective participant shall attach an explanation to the applicable bid/agreement/proposal.

Performance Excellence Partners, LLC
Business/Contractor/Agency

Rachel E. Ramirez
Name of Authorized Representative

President & CEO
Title of Authorized Representative

Rachel E. Ramirez
Signature of Authorized Representative

March 14, 2017
Date

120141001

RFP No. EP17-051

Workforce Development Services/Subject Matter Experts

Attachment D (1 of 2)



Entity Overview Details

DUNS: 082755759
CAGE: 3GCM4
Status: Active

7911 Professional Circle
Huntington Beach, CA 92648 - 1901
UNITED STATES

D&B Legal Business Name: PERFORMANCE EXCELLENCE PARTNERS, LLC
Doing Business as: PEP

Core Data

Business Information:

Business start date: 08/15/2000
Fiscal year end close date: 12/31
Company Division Name: N/A
Company Division Number: NA
Corporate URL: www.performexcel.com
Congressional District: CA 48
Registration Date: 08/30/2003
Activation Date: 01/05/2017
Expiration Date: 12/28/2017
Renewal Date: 12/28/2016
MPIN: PERFORM12

Physical Address:

Address line 1: 7911 Professional Circle
City: Huntington Beach
State: CA
ZIP/Postal Code: 92648 - 1901
Country: UNITED STATES

Mailing Address:

Address line 1: 7911 Professional Circle
City: Huntington Beach
State: CA
ZIP/Postal Code: 92648 - 1901
Country: UNITED STATES

Sensitive Information:

EIN: 542002104

IRS Consent:

Tax payer name: PERFORMANCE EXCELLENCE PARTNERS INC
Address Line 1: 7911 Professional Circle
Address Line 2:
City: Huntington Beach
State: CA
Country: UNITED STATES
Zip/Postal Code: 92648 - 1901
Type of Tax: Applicable Federal Tax
Tax Year (Most Recent Tax Year): 2014
Name of individual executing consent: RACHEL E RAMIREZ
Title of the individual executing consent: PRESIDENT, PERFORMANCE EXCELLENCE PARTNERS, INC.
Signature: RACHEL E RAMIREZ
Tin consent date: 12/28/2016

CAGE/NCAGE Code:

CAGE: 3GCM4

Does this entity have an Immediate Owner? No

Does this entity have any Predecessors? No

General Information

Country of Incorporation: UNITED STATES
State of Incorporation: DE
Company Security Level: Government Top Secret
Highest Employee Security Level: Government Top Secret

Business Types:

For more information on an entity's socio-economic status please see SBA's Dynamic Small Business Search.

- Business Types
 - Woman Owned Small Business
 - Self-Certified Small Disadvantaged Business
 - Hispanic American Owned
 - Minority Owned Business
 - Woman Owned Business
- DOT Certifications
 - DOT Certified DBE
- Entity Structure
 - Corporate Entity (Not Tax Exempt)



TAMI BERG Log Out

MY SAM SEARCH RECORDS DATA ACCESS ABOUT HELP

Entity Dashboard

PERFORMANCE EXCELLENCE PARTNERS, LLC
DUNS: 062736799 - CAGE Code: 3GCN4
Status: Active
Expiration Date: 12/26/2017
Purpose of Registration: All Awards

191 Professional Clinic
Huntington Beach, CA 92648-1001
UNITED STATES

Entity Overview

Entity Registration

- Core Data
- Assertions
- Reps & Certs
- POCs

Reports

- Service Contract Report
- BioPreferred Report

Exclusions

- Active Exclusions
- Inactive Exclusions
- Excluded Family Members

[BACK TO USER DASHBOARD](#)

Entity Registration Summary

DUNS: 062736799
Name: PERFORMANCE EXCELLENCE PARTNERS, LLC
Doing Business As: PEP
Business Type: Business or Organization
Last Updated By: TAMI BERG
Registration Status: Active
Activation Date: 01/05/2017
Expiration Date: 12/26/2017

Exclusion Summary

Active Exclusion Records? No



IBM V. P. 201701034-001

Search Records | Disclaimers | FAPIS.gov
Data Access | Accessibility | GSA.gov/IAE
About | Privacy Policy | GSA.gov
Help | USA.gov

ATTACHMENT E: W-9 REQUEST FOR TAXPAYER IDENTIFICATION NUMBER AND CERTIFICATION



City of Long Beach
 Purchasing Division
 333 West Ocean Boulevard, 7th Floor
 Long Beach, CA 90802

W-9
 Form 1099-INT
 (Rev. December 2014)
 Department of the Treasury
 Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

1. Name (do not check any of the following boxes unless you are certain that the name is correct. Name is required on this form; do not leave this line blank.)
Performance Excellence Partners, LLC

2. Business name (the registered entity name, if different from above)

3. Check appropriate box for federal tax classification; check only one of the following seven boxes:
 Individual/sole proprietor or single-member LLC
 Limited liability company (LLC) that is disregarded as an entity separate from its owner (do not check this box if the LLC has more than one owner)
 Other (see instructions)
 Partnership
 S Corporation
 Trust/estate
 Nonresident alien partner/owner
 Note: For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above (a) the tax classification of the single-member owner.

4. Exemptions (codes apply only to certain entities; see instructions on page 2):
 Exempt (specify code if any): _____
 Exempt from FATCA reporting (code if any): _____
 (Do not check any of these boxes for the U.S.)

5. Address (street, street, and apt. or suite no.)
7911 Professional Circle

6. City, state, and ZIP code
Huntington Beach, CA 92648

7. Tax account number(s) (see instructions)

Part I Taxpayer Identification Number (TIN)
 Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN on page 3.
 Note: If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Part II Certification
 Under penalties of perjury, I certify that:
 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
 3. I am a U.S. citizen or other U.S. person (defined below); and
 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.
Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here: Richard L. Lanning Date: 3/14/2017

General Instructions
 Section references are to the Internal Revenue Code unless otherwise noted.
 Future developments. Information about developments affecting Form W-9 (such as legislation enacted after the release of this form) is at www.irs.gov/w9.

Purpose of Form
 An individual or entity (from W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report an information return that shows paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:
 • Form 1000-INT (interest earned or paid)
 • Form 1000-LW (dividends, including those from stocks or mutual funds)
 • Form 1000-MSK (miscellaneous types of income, prizes, awards, or gross proceeds)
 • Form 1099-D (stock or mutual fund sales and certain other transactions by brokers)
 • Form 1000-S (gross proceeds from real estate transactions)
 • Form 1000-K (partnership capital and other partnership transactions)

• Form 1099 (some mortgage interest), 1099-E (student loan interest), 1099-I (dividend)
 • Form 1000-C (consolidated debt)
 • Form 1000-A (acquisition or abandonment of secured property)
 Use Form W-9 only if you are a U.S. person (including a limited liability company, in which case you are a U.S. person).
 If you do not submit Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 7.
 By signing the attached form, you:
 1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
 2. Certify if you are not subject to backup withholding, or
 3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you also certify that the U.S. person you are claiming status of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
 4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See What is FATCA reporting? on page 2 for relevant instructions.

Col. No. 11631X Form W-9 (Rev. 12-2014)



City of Long Beach
 Purchasing Division
 333 West Ocean Boulevard, 7th Floor
 Long Beach, CA 90802

VENDOR APPLICATION FORM

Company Name (same as line 1 on W9):	Performance Excellence Partners, LLC		
DBA Name (same as line 2 on W9):			
Federal Tax ID Number (or SSN):	[REDACTED]	required (this number is a fed tax ID: <input type="radio"/> SSN: <input type="radio"/>	leave blank if not applicable
Web Address:	www.performexcel.com		
Purchase Order Address:	7911 Professional Circle		
Attn:	Rachel E. Ramirez		
City:	Huntington Beach		
State:	CA	Zip Code:	92648
Contact Name:	Rachel E. Ramirez		
Email:	rramirez@performexcel.com		
Phone Number:	(714) 374-1140		
Fax:	(714) 374-1120		
Toll Free:			
'Remit to' Address :	If 'remit to' address is the same as the purchase order address, put SAME in first box only SAME		
Attn:			
City:			
State:	Zip Code:		
Contact Name:			
Email:			
Phone Number:			
Fax:			
Toll Free:			
Type of Ownership:	Individual <input type="radio"/> Partnership <input type="radio"/> Corporation <input type="radio"/> LLC <input checked="" type="radio"/> Nonprofit <input type="radio"/> Government <input type="radio"/>		
Composition of Ownership (at least 51% of ownership of the organization) (check all that apply)	MBE <input checked="" type="checkbox"/> WBE <input checked="" type="checkbox"/> Local <input type="checkbox"/> DBE <input type="checkbox"/> Certified SBE <input type="checkbox"/> Certified Micro <input type="checkbox"/>		
	State certification number:		

ATTACHMENT F: SECRETARY OF STATE CERTIFICATION



City of Long Beach
Purchasing Division
333 West Ocean Boulevard, 7th Floor
Long Beach, CA 90802

Attachment F

Secretary of State Certification

Please provide print out showing your business is registered with the California Secretary of State.

(Note, individual and sole proprietor companies are not required to register)

Awarded vendors/contractors must be registered with the California Secretary of State prior to contract execution. For more information, please consult:

<https://businesssearch.sos.ca.gov/>

Business Search

This search provides access to available information for corporations, limited liability companies and limited partnerships of record with the California Secretary of State, including free uncertified PDF copies of the most recent Statements of Information filed for corporations and limited liability companies, if the statements have been adopted. Please note: This search is not intended to serve as a name availability search. For information on checking or reserving a name, refer to [Name Availability](#).

To conduct a search:

- Select the applicable search type
- In the "Search Criteria" box, enter the entity name or number you wish to search. Note: If entering the entity number of a corporation, the number must begin with the letter C
- Select the search filter you wish to use to locate the entity: if searching for an entity name
- Select the Search button
- For help with searching an entity name or number, refer to [Search Tips](#)


All fields marked with an asterisk (*) are required.

Search Type: Search by Corporation Name Search by LP/LLC Name Search by Entity Number

Search Criteria: Search Filter: Keyword:

Search

16-792607

 **Secretary of State**
Statement of Information 143
 (Limited Liability Company) ✓ LLC-12

FILED
Secretary of State
State of California
DEC 07 2016

IMPORTANT — Read instructions before completing this form.

Filing Fee - \$20.00

Copy Fees - Face Page \$1.00 & .50 for each attachment page,
Certification Fee - \$5.00

2/1/20/PC
This Space For Office Use Only

1. Limited Liability Company Name
Performance Excellence Partners, LLC

2. 12-Digit Secretary of State File Number
201632710087

3. State or Place of Organization (only if formed outside of California)
Delaware

4. Business Addresses

a. Street Address of Principal Office - Do not list a P.O. Box 7911 Professional Circle	City (no abbreviations) Huntington Beach	State CA	Zip Code 92648
b. Mailing Address of LLC, if different than Item 4a	City (no abbreviations)	State	Zip Code
c. Street Address of California Office, if Item 4a is not in California - Do not list a P.O. Box	City (no abbreviations)	State CA	Zip Code

5. Manager(s) or Member(s) If no managers have been appointed or elected, provide the name and address of each member. At least one name and address must be listed. Attach additional pages, if necessary.

a. First Name Rachel	Middle Name E.	Last Name Ramirez	Suffix
b. Address 7911 Professional Circle	City (no abbreviations) Huntington Beach	State CA	Zip Code 92648

6. Agent for Service of Process Item 6a and 6b: If the agent is an individual, the agent must reside in California and Item 6a and 6b must be completed with the agent's name and California address. Item 6c: If the agent is a California Registered Corporate Agent, a current agent registration certificate must be on file with the California Secretary of State and Item 6c must be completed (leave Item 6a-6b blank).

a. California Agent's First Name (if agent is not a corporation) Rachel	Middle Name E.	Last Name Ramirez	Suffix
b. Street Address (if agent is not a corporation) - Do not list a P.O. Box 7911 Professional Circle	City (no abbreviations) Huntington Beach	State CA	Zip Code 92648
c. California Registered Corporate Agent's Name (if agent is a corporation) - Do not complete Item 6a or 6b			

7. Type of Business

a. Describe the type of business or services of the Limited Liability Company
Management consulting

8. Chief Executive Officer, if elected or appointed

a. First Name	Middle Name	Last Name	Suffix
b. Address	City (no abbreviations)	State	Zip Code

9. The information contained herein, including any attachments, is true and correct.

11/15/2016 Rachel E. Ramirez Manager
 Date Type or Print Name of Person Completing the Form Title
 Signature: *Rachel E. Ramirez*

Return Address (Optional) (For communication from the Secretary of State related to this document, or if purchasing a copy of this filed document enter the name of a person or company and the mailing address. This information will become public when filed. SEE INSTRUCTIONS BEFORE COMPLETING.)

Name: Jack Earley
 Company: Barth Calderon LLP
 Address: 333 City Blvd W, Ste 2050
 City/State/Zip: Orange, CA 92868

LLC-12 (REV 06/2016)

2016 California Secretary of State
www.sos.ca.gov/business

State of California
Secretary of State

CERTIFICATE OF REGISTRATION

I, ALEX PADILLA, Secretary of State of the State of California, hereby certify:

That on the 15th day of November, 2016, PERFORMANCE EXCELLENCE PARTNERS, LLC, complied with the requirements of California law in effect on that date for the purpose of registering to transact intrastate business in the State of California; and further purports to be a limited liability company organized and existing under the laws of Delaware as PERFORMANCE EXCELLENCE PARTNERS, LLC and that as of said date said limited liability company became and now is duly registered and authorized to transact intrastate business in the State of California, subject, however, to any licensing requirements otherwise imposed by the laws of this State.

IN WITNESS WHEREOF, I execute
this certificate and affix the Great Seal
of the State of California this day of
November 22, 2016.



ALEX PADILLA
Secretary of State

SC

NP-26 (REV 01/2015)

201632710087

LLC-5 Application to Register a Foreign Limited Liability Company (LLC)

To register in California an LLC from another state, country or other place, fill out this form, and submit for filing along with:

- A \$70 filing fee, and
- A certificate of good standing, issued within the last six (6) months by the agency where the LLC was formed.
- A separate, non-refundable \$16 service fee also must be included, if you drop off the completed form.

Important! LLCs in California may have to pay a minimum \$800 yearly tax to the California Franchise Tax Board. For more information, go to <https://www.ftb.ca.gov>.

Registered LLCs cannot provide in California "professional services," as defined by California Corporations Code sections 13401(a) and 13401.3.

FILED
Secretary of State
State of California

NOV 15 2016

IPC

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For questions about this form, go to www.sos.ca.gov/business/be/filing-llcs.htm

LLC Name to be used for this LLC in California

- ① a. Performance Excellence Partners, LLC

LLC Name List the LLC name you use now (exactly as listed on your certificate of good standing)

b.

Alternate Name If the LLC name in item 1a does not comply with California Corporations Code section 17701.08; list an alternate name to be used in California exactly as it is to appear on the records of the California Secretary of State. The alternate name must include: LLC, L.L.C., Limited Liability Company, Limited Liability Co., Ltd. Liability Co. or Ltd. Liability Company; and may not include: bank, trust, trustee, Incorporated, Inc., corporation, or corp., insurer, or insurance company. For general entity name requirements and restrictions, go to www.sos.ca.gov/business/be/name-availability.htm.

LLC History

- ② a. Date your LLC was formed (MM, DD, YYYY): 08/29/2000

b. State, country or other place where your LLC was formed: Delaware

c. Your LLC currently has powers and privileges to conduct business in the state, country or other place listed above.

Service of Process (List a California resident or a California registered corporate agent that agrees to be your initial agent to accept service of process in case your LLC is sued. You may list any adult who lives in California. You may not list an LLC as the agent. Do not list an address if the agent is a California registered corporate agent as the agent's address for service of process is already on file.)

- ③ a. Rachel E. Ramirez

Agent's Name

- b. 7911 Professional Circle

Huntington Beach CA 92648

Agent's Street Address (if agent is not a corporation) - Do not list a P.O. Box City (no abbreviations) State Zip

If the agent listed above has resigned or cannot be found or served after reasonable attempts, the California Secretary of State will be appointed the agent for service of process for your LLC.

LLC Addresses

- ④ a. 7911 Professional Circle Huntington Beach CA 92648

Street Address of Principal Executive Office - Do not list a P.O. Box City (no abbreviations) State Zip

b. 7911 Professional Circle CA

Street Address of Principal Office in California, if any - Do not list a P.O. Box City (no abbreviations) State Zip

c. 7911 Professional Circle CA 92648

Mailing Address of Principal Executive Office, if different from 4a or 4b City (no abbreviations) State Zip

Read and sign below:

I am authorized to sign this document under the laws of the state, country or other place where this LLC was formed.

Rachel E. Ramirez
Sign here

Rachel E. Ramirez
Print your name here

Manager
Your business title

Make check/money order payable to: Secretary of State
Upon filing, we will return one (1) uncertified copy of your filed document for free, and will certify the copy upon request and payment of a \$5 certification fee.

By Mail
Secretary of State
Business Entities, P.O. Box 044228
Sacramento, CA 94244-2280

Drop-Off
Secretary of State
1600 11th Street, 3rd Floor
Sacramento, CA 95814

Corporations Code §§ 17701.04, 17701.08, 17708.02, Revenue and Taxation Code § 17941
LLC-5 (REV 01/2014)

2014 California Secretary of State
www.sos.ca.gov/business/be

ATTACHMENT G: EQUAL BENEFITS ORDINANCE (EBO)



City of Long Beach
Purchasing Division
333 West Ocean Boulevard, 7th Floor
Long Beach, CA 90802

Attachment G

Equal Benefits Ordinance Form (EBO)

EQUAL BENEFITS ORDINANCE DISCLOSURE FORM

As a condition of being awarded a contract with the City of Long Beach ("City"), the selected Contractor/Vendor ("Contractor") may be required during the performance of the Contract, to comply with the City's nondiscrimination provisions of the Equal Benefits Ordinance ("EBO") set forth in the Long Beach Municipal Code section 2.73 et seq. The EBO requires that during the performance of the contract, the Contractor shall provide equal benefits to its employees with spouses and employees with domestic partners. Benefits include but are not limited to, health benefits, bereavement leave, family medical leave, member ship and membership discounts, moving expenses, retirement benefits and travel benefits. A cash equivalent payment is permitted if an employer has made all reasonable efforts to provide domestic partners with access to benefits but is unable to do so. A situation in which a cash equivalent payment might be used if where the employer has difficulty finding an insurance provider that is willing to provide domestic partner benefits.

The EBO is applicable to the following employers:

- For-profit employers that have a contract with the City for the purchase of goods, services, public works or improvements and other construction projects in the amount of \$100,000 or more
- For-profit entities that generate \$350,000 or more in annual gross receipts leasing City property pursuant to a written agreement for a term exceeding 29 days in any calendar year

Contractors who are subject to the EBO must certify to the City before execution of the contract that they are in compliance with the EBO by completing the EBO Certification Form, attached, or that they have been issued a waiver by the City. Contractors must also allow authorized City representatives access to records so the City can verify compliance with the EBO.

The EBO includes provisions that address difficulties associated with implementing procedures to comply with the EBO. Contractors can delay implementation of procedures to comply with the EBO in the following circumstances

- 1) By the first effective date after the first open enrollment process following the contract start date, not to exceed two years, if the Contractor/vendor submits evidence of taking reasonable measures to comply with the EBO; or
- 2) At such time that the administrative steps can be taken to incorporate nondiscrimination in benefits in the Contractor/vendor's infrastructure, not to exceed three months; or
- 3) Upon expiration of the contractor's current collective bargaining agreement(s).

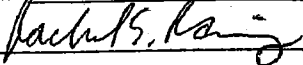
Compliance with the EBO

If a contractor has not received a waiver from complying with the EBO and the timeframe within which it can delay implementation has expired but it has failed to comply with the EBO, the

Contractor may be deemed to be in material breach of the Contract. In the event of a material breach, the City may cancel, terminate or suspend the City agreement, in whole or in part. The City also may deem the Contractor an irresponsible bidder and disqualify the Contractor from contracting with the City for a period of three years. In addition, the City may assess liquidated damages against the Contractor which may be deducted from money otherwise due the Contractor. The City may also pursue any other remedies available at law or in equity.

By my signature below, I acknowledge that the Contractor understands that to the extent it is subject to the provisions of the Long Beach Municipal Code section 2.73, the Contractor shall comply with this provision.

Printed Name: Rachel E. Ramirez Title: President & CEO

Signature:  Date: March 14, 2017

Business Entity Name: Performance Excellence Partners, LLC

**CERTIFICATION OF COMPLIANCE WITH THE
EQUAL BENEFITS ORDINANCE**

Section 1. CONTRACTOR/VENDOR INFORMATION

Name: Rachel E. Ramirez Federal Tax ID No. [REDACTED]
Address: 7911 Professional Circle
City: Huntington Beach State: CA ZIP: 92648
Contact Person: Rachel E. Ramirez Telephone: (714) 374-1140
Email: rramirez@performexcel.com Fax: (714) 374-1120

Section 2. COMPLIANCE QUESTIONS

- A. The EBO is inapplicable to this Contract because the Contractor/Vendor has no employees. Yes No
- B. Does your company provide (or make available at the employees' expense) any employee benefits? Yes No
(If "yes," proceed to Question C. If "no," proceed to section 5, as the EBO does not apply to you.)
- C. Does your company provide (or make available at the employees' expense) any benefits to the spouse of an employee?
 Yes No
- D. Does your company provide (or make available at the employees' expense) any benefits to the domestic partner of an employee?
 Yes No (If you answered "no" to both questions C and D, proceed to section 5, as the EBO is not applicable to this contract. If you answered "yes" to both Questions C and D, please continue to Question E. If you answered "yes" to Question C and "no" to Question D, please continue to section 3.)
- E. Are the benefits that are available to the spouse of an employee identical to the benefits that are available to the domestic partner of an employee? Yes No
(If "yes," proceed to section 4, as you are in compliance with the EBO. If "no," continue to section 3.)

Section 3. PROVISIONAL COMPLIANCE

- A. Contractor/vendor is not in compliance with the EBO now but will comply by the following date:

_____ By the first effective date after the first open enrollment process following the contract start date, not to exceed two years, if the Contractor/vendor submits evidence of taking reasonable measures to comply with the EBO; or

_____ At such time that the administrative steps can be taken to incorporate nondiscrimination in benefits in the Contractor/vendor's infrastructure, not to exceed three months; or

____ Upon expiration of the contractor's current collective bargaining agreement(s).

- B. If you have taken all reasonable measures to comply with the EBO but are unable to do so, do you agree to provide employees with a cash equivalent? (The cash equivalent is the amount of money your company pays for spousal benefits that are unavailable for domestic partners.)
____ Yes ____ No

Section 4. REQUIRED DOCUMENTATION

At time of issuance of purchase order or contract award, you may be required by the City to provide documentation (copy of employee handbook, eligibility statement from your plans, insurance provider statement, etc.) to verify that you do not discriminate in the provision of benefits.

Section 5. CERTIFICATION

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that I am authorized to bind this entity contractually. By signing this certification, I further agree to comply with all additional obligations of the Equal Benefits Ordinance that are set forth in the Long Beach Municipal Code and in the terms of the contract of purchase order with the City.

Executed this 14 day of March, 2017, at Huntington Beach, CA

Name Rachel E. Ramirez

Signature

Rachel E. Ramirez

Title President & CEO

Federal Tax ID No. ██████████

ATTACHMENT H: SMALL BUSINESS ENTERPRISE PROGRAM – EXEMPT



City of Long Beach
Purchasing Division
333 West Ocean Boulevard, 7th Floor
Long Beach, CA 90802

Attachment H

Small Business Enterprise (SBE) Program – EXEMPT

ATTACHMENT I: INSURANCE REQUIREMENTS



City of Long Beach
Purchasing Division
333 W. Ocean Blvd 7th Floor
Long Beach, CA 90802

INSURANCE REQUIREMENTS

[Contractor = Subject Matter Experts]

INDEMNIFICATION: Contractor shall defend, indemnify, and hold harmless the City, its Commissions and Boards, and their officials, employees, and agents from and against any and all demands, claims, causes of action, liability, loss, liens, damage, costs, and expenses (including attorney's fees) arising from or in any way connected or alleged to be connected with Contractor's performance of the work under this Agreement and from any act or omission, willful misconduct, or negligence (active or passive) by or alleged to be by Contractor, its employees, agents, or subcontractors either as a sole or contributory cause, sustained by any person or entity (including employees or representatives of City or Contractor). The foregoing shall not apply to claims or causes of action caused by the sole negligence or willful misconduct of the City, its Commissions and Boards, or their officials, employees, or agents.

INSURANCE. As a condition precedent to the effectiveness of this Agreement, Contractor shall procure and maintain at Contractor's expense for the duration of this Agreement from an insurance company that is admitted to write insurance in the State of California or that has a rating of or equivalent to an A:VIII by A.M. Best and Company the following insurance:

- (a) Commercial general liability insurance or self-insurance equivalent in coverage scope to ISO CG 00 01 10 93 naming the City of Long Beach, and their officials, employees, and agents as additional insureds on a form equivalent in coverage scope to ISO CG 20 26 11 85 from and against claims, demands, causes of action, expenses, costs, or liability for injury to or death of persons, or damage to or loss of property arising out activities performed by or on behalf of the Contractor in an amount not less than One Million Dollars (US \$1,000,000) per occurrence and Two Million Dollars (US \$2,000,000) in general aggregate. If the subject matter expert may be working with minors or other vulnerable groups at any time during this Agreement, this insurance shall include coverage for insureds accused of participating in a physical abuse, sexual misconduct or sexual molestation.
- (b) Workers' compensation coverage as required by the Labor Code of the State of California and Employer's liability insurance with minimum limits of One Million Dollars (US \$1,000,000) per accident or occupational illness. The policy shall be endorsed with a waiver of the insurer's right of subrogation against the City of Long Beach, and their officials, employees, and agents.
- (c) Automobile liability insurance equivalent in coverage scope to ISO CA 00 01 06 92 in an amount not less than Five Hundred Thousand Dollars (US \$500,000) combined single limit (CSL) per accident for bodily injury and property damage covering owned, non-owned, and hired automobiles.

Page 1 of 2

RFP No. EP 17-051

Attachment I



City of Long Beach
 Purchasing Division
 333 w. Ocean Blvd 7th Floor
 Long Beach, CA 90802

(d) As applicable to the discipline of the subject matter expert, professional liability or errors and omissions liability insurance in an amount not less than One Million Dollars (\$1,000,000) per claim and in aggregate covering the services provided pursuant to this Agreement.

Any self-insurance program or self-insurance retention must be approved separately in writing by City and shall protect the City of Long Beach, and their officials, employees, and agents in the same manner and to the same extent as they would have been protected had the policy or policies not contained retention provisions. Each Insurance policy shall be endorsed to state that coverage shall not be suspended, voided, or canceled by either party except after thirty (30) days prior written notice to City, and shall be primary and not contributing to any other insurance or self-insurance maintained by City.

Any subcontractors which Contractor may use in the performance of this Agreement shall be required to indemnify the City to the same extent as the Contractor and to maintain insurance in compliance with the provisions of this section.

Contractor shall deliver to City certificates of insurance and original endorsements for approval as to sufficiency and form prior to the start of performance hereunder. The certificates and endorsements for each insurance policy shall contain the original signature of a person authorized by that insurer to bind coverage on its behalf. "Claims-made" policies are not acceptable unless City Risk Manager determines that "Occurrence" policies are not available in the market for the risk being insured. In a "Claims-made" policy is accepted, it must provide for an extended reporting period of not less than one hundred eighty (180) days. Such insurance as required herein shall not be deemed to limit Contractor's liability relating to performance under this Agreement. City reserves the right to require complete certified copies of all said policies at any time. Any modification or waiver of the insurance requirements herein shall be made only with the approval of City Risk Manager. The procuring of insurance shall not be construed as a limitation on liability or as full performance of the indemnification provisions of this Agreement.

By submitting a signature below, Bidder agrees that insurance requirements can be provided as requested.

Printed Name: Rachel E. Ramirez Title: President & CEO
 Signature: *Rachel E. Ramirez* Date: March 14, 2017



CERTIFICATE OF LIABILITY INSURANCE

PERFO-6 OP ID: ES

DATE (MM/DD/YYYY)

03/01/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).


PRODUCER: ISU Ins. Svc.-Comarc Teaman License# 0E63467 25220 Hancock Ave. #200 Murrieta, CA 92562 Eric Sammons	CONTACT NAME: Eric Sammons PHONE (AC, Ho, Ext): 951-290-5040 FAX (AC, No): 951-278-0884 E-MAIL ADDRESS: eric@isucormarc.com	INSURER(S) AFFORDING COVERAGE INSURER A: Travelers Casualty & Surety Co NAIC # 31194 INSURER B: Travelers Casualty Ins Co 19046 INSURER C: Executive Risk Indemnity INSURER D: INSURER E: INSURER F:
INSURED Performance Excellence Partners, LLC 7911 Professional Circle Huntington Beach, CA 92648		

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER: 001**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSUR LTR	TYPE OF INSURANCE	ADDITIONAL INSURED	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO <input type="checkbox"/> LOC <input type="checkbox"/> OTHER	X	680-4D220111-14-42	09/27/2016	09/27/2017	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (EA OCCURRENCE) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS		680-4D220111-14-42	09/27/2016	09/27/2017	COMBINED SINGLE LIMIT (EA OCCURRENCE) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If Yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N/A	X IH-UB-4119T11-9	09/27/2016	09/27/2017	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Prof. Liability		8241-4730	09/27/2016	09/27/2017	Limit \$ 1,000,000 Ded \$ 5,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 The City of Long Beach its officials, employees, and agents are named as additional insured with respects to general liability per CGD1050494. Coverage is Primary and Non Contributory per CGD0370405. Waiver of subrogation endorsement to follow from wc carrier.

CERTIFICATE HOLDER The City of Long Beach 333 W. Ocean Blvd Long Beach, CA 90802	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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