



San Diego Convention Center Corporation

REQUEST FOR PROPOSAL

Insurance Brokerage Services for the Placement and Administration of Employee Group Health, Vision, Dental and Life Insurance Benefits

RFP Schedule

Issue Date: August 15, 2008

Deadline for Submitting Questions: August 29, 2008, 4:00 PM (PDT)

Response Due Date: September 12, 2008, 4:00 PM (PDT)

RFP #: 2008-08

Purchasing Contact: Stephanie Chen (619) 525-5381

Solicitation

The San Diego Convention Center Corporation (“Corporation”) is soliciting proposals from qualified businesses or individuals (“Respondents”) who are interested in providing Insurance Brokerage Services for the placement and administration of employee group health, vision, dental and life insurance benefits as further describe herein. Respondents must demonstrate the ability to perform the work described in the Scope of Services set forth in this Solicitation and have significant experience successfully performing comparable work.

The Corporation is not required to engage in a public bidding process to solicit proposals, quotes, information or statements of qualification. This process is not subject to protest or appeal.

Neither the Respondent nor its agents, lobbyists, attorneys or other parties representing the interests of the Respondent shall contact members of the San Diego Convention Center Board of Directors, the San Diego City Council, or the San Diego Unified Port District with regard to this project or process. Any such contact shall be grounds for automatic disqualification of the potential Respondent and it’s proposal.

This solicitation is not an offer or commitment to purchase any goods or services or to award or enter into a contract.

Information on Corporation

The Corporation is a California nonprofit public benefit Corporation and its primary business is management, operation and marketing of the San Diego Convention Center (Center). Corporation is not a governmental entity.

Corporation has a corporate policy on equal opportunity contracting. Small, local, disadvantaged, women-owned, and ethnic minority-owned businesses are encouraged to submit responses to this Solicitation.

Background

The health insurance plan year for the San Diego Convention Center Corporation begins March 1st with open enrolment conducted each February. We currently have 231 eligible full time employees. Thirty-seven employees currently waive health coverage, ninety-eight have employee only, thirty-three employee plus child(ren), twenty employee plus spouse and forty-three family coverage. The Corporation offers two HMO choices, the ability to buy up to a selected HMO plan and the ability to buy up to a PPO plan. The Corporation offers a medical PPO plan for employees outside of California, and a medial HMO for employees who reside in Mexico. We also offer a DMO and a dental PPO plan.

Current Plan Benefit

Premiums for group medical and dental insurance are paid on the basis of pre-tax or post-tax dollars. Employer contribution depends upon labor union affiliation.

1. Group Medial Insurance – The Corporation currently offers a choice of two (2) local HMOs. Both plans include vision care, and require co-payments for doctor visits and prescriptions. Dependents may be covered at the option of the employee. Employee premium contributions are required for both employees and dependents. Current and previous providers:

- Kaiser Permanente
- Healthnet
- Simnsa
- PacifiCare
- Blue Cross
- Aetna

2. PPO Medical Plan – The Corporation currently offers this type of plan in addition to an HMO as an option to employees.

3. The Corporation offers HMO services in Mexico for employees who reside in Mexico as an option.

4. Dental Insurance – Employees currently choose between two (2) plans. One offers an indemnity plan with a deductible, and the other a prepaid plan with various co-payments but no deductible. Employee premium contributions are required for both employees and dependents. Current and previous providers:

- SafeGuard
- PacifiCare

5. Long Term Disability – Paid by the Corporation.

6. Term Life Insurance – The Corporation provides life insurance equal to one and one half times the base salary of the employee, to a maximum of \$500,000.

7. Universal Life Insurance – Supplemental, voluntary life insurance with cash value savings feature is offered to employees at a cost, with the option to add dependents.

8. Flex spending account pre-tax programs for dependent care and medical out of pocket costs.

Scope of Services for this Solicitation

Corporation desires to engage the services of a single firm, located within (or with easy access to) the greater San Diego area, to provide services of a broker ("Contractor") as described herein for the provision of Insurance Brokerage Services for the Placement and Administration of Employee Group Health, Vision, Dental and Life Insurance benefits.

The awarded Contractor will perform a full range of services ("Services") related to the acquisition, implementation, maintenance, communication and improvement of the Corporation's Plan within a flex plan structure. Responsibilities include but are not limited to the following:

1. Assist in the Plan design and provide for all insurance coverage that may be required by the Corporation, including but not limited to, the coverage described in the Current Plan Benefit section above.
2. Solicit proposals from insurance provider markets that specialize in the required insurance plans, and provide the Corporation original proposal documentation.
3. Represent Corporation in negotiations with providers on all issues, including those related to premiums, benefit levels, plan design and special terms and conditions.

4. Assist the Corporation with the implementation and communication of new programs or changes to existing programs, including presentations during open enrollment meetings.

5. Develop and publish a "Benefits Handbook" which describes benefits for all eligible employees, by bargaining unit or employee group. Handbooks should be available in Spanish also.

6. Assist the Corporation in administering all components of the Plan; respond to questions from and provide information to employee representatives and Plan participants; settle claim disputes; and provide other oversight services as needed during the course of the Plan Year.

Contract Term

Corporation anticipates award of a contract on or about October 1, 2008. The initial term of the contract will be for a period of three (3) years with the option to renew for two (2) additional one-year periods.

The services must be performed in accordance with the specifications, terms and conditions of a written contract. A specimen of Corporation's standard contract terms and conditions is attached to this Solicitation.

Response Requirements and Content

Prior to submitting a response, the Respondent must carefully review this Solicitation and any addenda subsequently issued. The Respondent is responsible for seeking any clarification or information needed to respond. The Respondent is solely responsible for any deficiencies in the response submitted.

The Respondent must review the terms and conditions set forth in the specimen contract attached hereto and, in the submittal, specifically identify any provisions the Respondent finds unacceptable or desires to negotiate.

The Respondent is solely responsible for all costs, direct or indirect, incurred responding to this Solicitation. The Corporation will incur no obligation or liability in connection with the submittal of a response.

A responsive submittal must include the following:

- a completed and signed Solicitation Response Submittal Cover Sheet
- a completed Equal Opportunity Contracting Workforce Report and information demonstrating the Respondent's commitment to equal opportunity, such as efforts related to workforce diversity or contracting

- a brief description of the firm or business entity, including firm history, experience, number of employees, organization structure, ownership structure and expertise, and resumes for principals or employees who would perform the Services in this Solicitation and identify the assigned individual authorized by your firm to solicit carriers and negotiate quotes
- information about proposed carrier, including claims payment procedures, Best rating, abilities, experience and history, reserve establishment policies and financial soundness. Describe the ability to demonstrate a superior relationship with insurance companies the firm wishes to contact and describe the physician association network associated with the proposed providers that offers access to most major provider of San Diego County
- propose your firm's compensation model & cost, including specific information regarding process, calculations, and implementation
- information about the programs in place and those you will implement in the areas needed to service the resulting contract. Include programs such as local representation, ease of contact, flexibility, access to customer service staff via phone and electronic access; multicultural/diversity training programs; foreign language translators and internal training
- a list of current and former clients to whom the Respondent has provided services similar or comparable to those described in this Solicitation, and contact information (name and telephone or email address) for at least three (3) clients from whom Corporation may obtain references, and clearly identify any business relationship that the Respondent believes may give rise to a conflict of interest if selected to provide the Services in this Solicitation
- any other relevant information that Respondent believes would assist the Corporation in evaluating the submittal

Alternates/Deviations. A Respondent may recommend consideration of alternate or additional services or material not identified in this Solicitation or deviations from the Scope of Work in this Solicitation which Respondent believes will enhance the specified Services or more successfully achieve the outcome sought by this Solicitation. Any alternates or deviations must be separately listed and described; however the submittal also must be responsive to the Scope of Work described in this Solicitation.

Proprietary Information. Certain documents in Corporation's possession are subject inspection and copying pursuant to the California Public Records Act [Cal. Govt. Code §6250, et. seq.]; however, the law does not require disclosure of proprietary information which constitutes a trade secret under California law. The Corporation will attempt to protect legitimate proprietary information included in any submittal, but shall not be

liable for the disclosure of any proprietary information.

Proprietary information included with a response submittal must be separately bound and clearly labeled with the words "Confidential Proprietary Information." Appropriate reference to this separately bound information must be made in the body of the submittal. ***Marking the entire submittal as proprietary will result in it being rejected and returned to the Respondent participant unread.***

Response Submittal Procedures

Clarifications. Requests for clarification of this Solicitation must be directed to Stephanie Chen, Purchasing Manager and submitted in writing, by facsimile to 525-5390 or by E-mail to stephanie.chen@visitsandiego.com prior to 4:00 pm (PDT) on Friday, August 29, 2008.

Addenda. Any material changes to this Solicitation resulting from either a request for clarification or a business decision of the Corporation will be issued in written form in the same manner this Solicitation was advertised. All changes in such addenda shall supersede or supplement this Solicitation. Respondents are solely responsible for determining whether any addenda have been issued prior to submittal of a response.

Response Submittal Package. Respondent must submit the following documents in a sealed envelope:

- One (1) signed original and five (5) copies of the Corporation's Solicitation Response Submittal Form attached hereto
- Six (6) copies of a typed or printed document on 8½ x 11 white paper that is a compilation of all of the information set forth in the Response Requirements and Contents.

The envelope must be addressed as follows:

San Diego Convention Center Corporation
Attn: Stephanie Chen, Purchasing Manager
Procurement Division – Request #2008-08
111 West Harbor Drive
San Diego, CA 92101

Submittal Deadline. Submittals must be received by 4:00 pm (PDT) on Friday, September 12, 2008.

Submittal Methods. Submittals may be sent by U.S. or private delivery mail service or by personal delivery to Corporation's Administration Offices. Submittal by E-mail, in PDF format, will be accepted provided the signed original of Corporation Solicitation Response Submittal Cover Sheet is received within twenty-four (24) hours after the

submittal deadline. Proposals received after the submittal deadline may be rejected.

Withdrawal of Submittal. A Respondent may withdraw its proposal by written request at any time prior to the submittal deadline. The Corporation will destroy, not return, the submittal package.

Selection Process

This Solicitation is seeking to identify the entities and persons most qualified to provide the Services. The Corporation, in its sole discretion, will determine which Respondents are most qualified to provide the Services, based on the information in the response submittals and input from references provided. These Respondents may be asked to interview with Corporation representatives and respond to questions regarding the submittal response. Corporation may elect to negotiate pricing with one or more of the best qualified Respondents. The Corporation, in its sole discretion, will make its final selection of the Respondent whose experience, expertise, reputation, capabilities, past performance and cost is determined to be most advantageous to the Corporation.

The Corporation's decision is final and is not subject to any form of administrative review, appeal or protest.

Contracting Process

Neither this Solicitation nor the selection of a Respondent will create a binding commitment on Corporation. Upon completion of the selection process, Corporation will award a contract to the party whom it elects to provide the Services in this Solicitation. A binding commitment will only occur when a contract between Corporation and the successful Respondent has been fully executed.

Disclaimers

The Corporation anticipates a single contractor will be selected as a result of this Solicitation; however, Corporation reserves the right, in its sole discretion, to award contracts to multiple contractors. The Corporation further reserves the right, in its sole discretion, to reject any or all response submittals, waive any informalities in this process or the submittal requirements; and/or cancel, in whole or in part, this Solicitation.

Attachments

The following documents are attached hereto and incorporated herein:

- ***Specimen Contract for Professional/Consulting Services***
- ***Solicitation Response Submittal Cover Sheet***
- ***Equal Opportunity Contracting Workforce Report***

SPECIMEN
CONTRACT FOR CONSULTING SERVICES
between
SAN DIEGO CONVENTION CENTER CORPORATION, INC.
and
CONTRACT NO.

This Contract is entered into on < >, by and between the SAN DIEGO CONVENTION CENTER CORPORATION, INC. (“Corporation”), a California nonprofit Corporation with primary offices located at 111 West Harbor Drive, in San Diego City and County, California and < >, a < > < >, with primary offices located at (“Contractor”), each individually referred to herein as a “party” or collectively as the “parties”.

RECITALS

WHEREAS, Corporation operates and manages the San Diego Convention Center (the “Center”); and,

WHEREAS, Corporation desires to engage the services of a qualified < >; and,

WHEREAS, Contractor is engaged in the business of providing such consulting services;

NOW THEREFORE, in consideration of the mutual covenants and conditions herein, the parties agree as follows:

SECTION 1. SCOPE OF SERVICES/PROJECT MANAGER

101. **Scope of Services.**

<Services>

Contractor shall provide additional Services as requested by Corporation during the course of the project.

102. Project Manager. The parties’ respective designated representatives shall be the day-to-day contact persons during the performance of the Services. Contractor’s Project Manager is its < >. Corporation’s Project Manager is < >. Corporation’s Project Manager may not: (a) award, renew, terminate or cancel the Contract; or (b) sign any documents binding the Corporation.

SECTION 2. TERM AND TERMINATION

All services required pursuant to this Contract shall commence on < > and shall continue until completion of Services, with an expected completion date of <>. Services, as determined by Corporation, or until terminated. Either party may terminate this Contract by giving ten (10) days written notice to the other party.

SECTION 3. FINANCIAL

301. Fees for Services. For Services performed under this Contract, Corporation shall pay Contractor compensation pursuant to the schedule set forth below:

< >

Contractor shall provide the Services outlined hereinabove on a time and materials basis. The compensation payable under this contract shall not exceed < > without written authorization from Corporation.

302. **Expense Reimbursement.** <if applicable> Corporation shall reimburse Contractor the actual amount (with no markup) for the following expenses incurred in performing the Services: photocopying, postage, long distance telephone charges and travel (pre-approved).

303. **Method of Payment.** Contractor shall submit itemized monthly invoices to the San Diego Convention Center Corporation, Attn: <Project Manager>. Invoices shall (1) reference this contract number [< >]; and (2) include a written description of work performed and time spent. Invoices approved by Corporation shall be paid within thirty (30) days of receipt. Corporation shall promptly notify Contractor of any disputed or disallowed charges for time or expenses.

304. **Billing Records.** Contractor shall maintain full and complete records of the time spent providing the Services and receipts for all expenses billed to the Corporation. Such records shall be retained for not less than three (3) years following expiration or termination of this Contract and provided to Corporation within five (5) business days following a written request.

305. **Funding Contingency.** Corporation's fiscal year is the period between July 1 of each calendar year and June 30 of the succeeding calendar year. Corporation's continued obligation to make payments under this Contract, beyond the current fiscal year, is contingent upon the availability of sufficient funding in each subsequent fiscal year(s).

SECTION 4. INSURANCE; INDEMNIFICATION

401. **Insurance.** Contractor shall procure and maintain all insurance required by law and good business practices.

402. **Indemnification.** Contractor shall indemnify, hold harmless and defend the Corporation, City of San Diego, San Diego Unified Port District, and their respective members, officers, directors, agents and employees from and against any and all liabilities, damages, actions, costs, losses, claims and expenses (including reasonable attorneys fees), arising out of, caused by or resulting from, in whole or in part, any act, omission, negligence, fault or violation of law or ordinance, associated with the use or occupancy of the Center by Contractor, its employees, agents, contractors, vendors, invitees or any other person entering the Center with Contractor's implied or express permission, Contractor's performance of this Contract, and any transactions arising out of or related to this Contract or performance of the Services herein. The effect and application of this indemnification provision shall survive the termination or expiration of this Contract.

SECTION 5. GENERAL PROVISIONS

501. **Independent Contractor Status.** Contractor is and shall remain an independent Contractor. Neither Contractor nor its agents or employees shall act as officers, agents, or employees of Corporation. Contractor has no authority to assume or create any commitment or obligation on behalf of Corporation, or to bind Corporation in any manner.

502. **Assignment; Subcontracting.** Notwithstanding Section 508. below, Contractor shall not assign or transfer any interest in this Contract, whether by assignment or novation, without the prior written consent of Corporation; and any purported assignment by Contractor, without prior written consent, shall be null and void, and constitute a material breach. Claims for money due or to become due to Contractor from Corporation pursuant to this Contract may be assigned to a bank, trust company, or other financial institutions, or to a Trustee in Bankruptcy, without such approval. Notice of any such assignment or transfer shall be furnished promptly to Corporation.

Except as specifically provided in this Contract, no performance required of Contractor herein may be subcontracted without Corporation's prior written approval.

503. **Ownership of Materials and Documents.** Any and all materials and documents prepared by the Contractor shall be the property of the Corporation from the moment of their preparation, and the Contractor shall deliver such materials and documents to the Corporation whenever requested to do so by the Corporation. However, the Contractor shall have the right to make duplicate copies of such materials and documents for its own

file or for other purposes as may be authorized in writing by the Corporation.

504. **Non-Disclosure.** The designs, plans, reports, investigations, materials, and documents prepared or acquired by the Contractor pursuant to this Agreement (including any duplicate copies kept by the Contractor) shall not be shown or disclosed to any other public or private person or entity directly or indirectly, except as authorized by the Corporation. The Contractor shall not disclose to any other public or private person or entity directly or indirectly, any information regarding the activities of the Corporation during the term of this Agreement or at any time thereafter except as authorized by the Corporation.

505. **Conflict of Interest.** During the term of this Contract, Contractor shall not perform Services of any kind for any person or entity that would conflict with the Services provided herein, without the prior written consent of the Corporation. By executing this Contract, Contractor warrants and represents that it does not, nor shall it, represent any client whose interests are adverse or hostile to the Corporation's objectives related to this. Corporation shall have the right to terminate this agreement, effective immediately, upon determining a conflict exists.

This contract may be immediately terminated by the Corporation if Contractor employs an individual who, within twelve months immediately preceding such employment, in his/her capacity as a Corporation employee, participated in negotiations with or otherwise had an influence on the selection of the Contractor.

506. **Standard Care; Licenses.** Contractor shall perform the Services in a skillful and competent manner. Contractor shall be responsible to Corporation for any errors or omissions in its performance of the Services. Contractor represents and warrants to Corporation that it has in effect, and shall retain, throughout the Term hereof, all licenses, permits, qualifications and approvals of whatever nature are required to practice its profession.

507. **Equal Opportunity Programs.** Contractor and each subcontractor, if any, shall fully comply with all applicable federal and state laws and regulations prohibiting discriminatory employment practices.

Contractor acknowledges that the Corporation seeks to promote employment and business opportunities for local residents and firms on all Corporation contracts. To the extent legally possible, Contractor agrees to solicit applications for employment and bids and proposals for subcontracts, for work associated with this Agreement, from local residents and firms. Contractor agrees to hire qualified local residents and firms whenever feasible.

508. **Binding on Successors and Assigns.** The provisions of this Contract shall be binding upon and shall inure to the benefit of the parties hereto and each of their respective successors and assigns.

509. **Subordination.** This Contract and the Corporation's obligations herein shall be subordinate to any obligations (including leases deeds of trusts, mortgages, and bonds) created or given by Corporation with respect to the Center. Contractor shall, upon request, give and execute written acknowledgements of this subordination provision to the holder(s) of any such obligations.

510. **Force Majeure.** The obligation of any party to perform any acts herein shall be suspended during the period such performance is prevented by acts of God; war; riot; invasion; fire; accident; strike or walkout; government interference, regulation, appropriation, or rationing; or by inability to secure goods because of the foregoing conditions. The obligation to perform shall resume immediately upon cessation of the force majeure condition(s).

511. **Notices.** Any notice required by this Contract shall be deemed to have been sufficiently communicated when (1) personally delivered or (2) on the second (2nd) business day after mailing by overnight delivery, postage prepaid:

to Corporation addressed:

President and Chief Executive Officer
San Diego Convention Center
Corporation, Inc.
111 West Harbor Drive
San Diego, California 92101-7899

with copies to:

Procurement Division
San Diego Convention Center
Corporation, Inc.
111 West Harbor Drive
San Diego, California 92101-7899

or to Contractor addressed:

< >

512. **Modifications and Amendments.** Any amendment or modification of this Contract shall be valid only when written and signed by each party.

513. **Partial Invalidity.** If any term or provision of this Contract is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remainder of the provisions of this Contract shall remain in full force and effect and shall in no way be affected, impaired or invalidated.

514. **Applicable Law.** This Contract is made and entered into in the State of California and its interpretation and enforcement and the construction of its terms shall be governed by California law.

515. **Attorneys' Fees.** If legal action, including arbitration or action for declaratory relief, is brought by either party to interpret or enforce any provisions of this Contract, the prevailing party shall be entitled to an award of reasonable attorneys' fees and other costs incurred, the award of which may be determined in the same action or a separate action brought for that purpose.

516. **Singular, Plural, and Gender.** As used herein, the singular shall include the plural and the masculine shall include the feminine or neuter.

517. **Headings.** All section and paragraph headings are for reference and convenience only and do not alter, amend, explain, interpret or otherwise affect the terms and conditions of this Contract.

518. **Entire Agreement.** This Contract represents the sole and entire agreement between Corporation and Contractor, and supersedes all prior negotiations, representations, agreements, arrangements or understandings, either oral or written, between or among the parties hereto, relating to the subject matter of this Contract.

IN WITNESS WHEREOF, the parties hereto have duly executed duplicate originals of this Contract on the date set forth on the first page hereof.

San Diego Convention Center Corporation

SOLICITATION RESPONSE SUBMITTAL COVER SHEET
(Professional/Consulting Services)

SDCCC Request # _____ Respondent's Name _____

Business Address: _____

Phone _____ Fax _____ Website _____

Proprietorship Partnership Corporation LLC LLP FEIN # _____

If Corporation, specify the State where your firm was incorporated _____

If Proprietorship using a dba, give owner's name _____

If Partnership, list all general partner(s) _____

If LLC or LLP, list managing member(s)/partner(s) _____

Primary contact for the Solicitation Process _____

Title _____ Phone _____ Fax _____ Email _____

Person Authorized to sign for Respondent: _____
Name Title

Primary contact for project: _____
Name Title

Address or Same as Respondent Phone Fax Email

List the names and titles of persons who will perform Services if Respondent is selected: _____

Can Respondent commence work on the start date in the Solicitation? Y / N If no, when? _____

Has the Specimen Contract attached to the Solicitation been reviewed? Y / N

Are any terms unacceptable? Y / N If yes, specify the terms _____

Would Respondent seek to negotiate any terms? Y / N If yes, specify the terms _____

Describe the Respondent's ability, if selected, to promptly respond to requests from SDCCC _____

CERTIFICATION

I declare that the foregoing is true and correct and that I am authorized to make this representation and submit the attached Response to SDCCC's Request # _____ on behalf of _____.

Type or Print Respondent's Name

Date: _____

Signature

Type or Print Name

Title

WORK FORCE REPORT – NAME OF FIRM: _____ DATE: _____

OFFICE(S) or BRANCH(ES): _____ COUNTY: _____

INSTRUCTIONS: For each occupational category, indicate number of males and females in every ethnic group. Total columns in row provided. Sum of all totals should be equal to your total work force. Include all those employed by your company on either a full or part-time basis. The following groups are to be included in ethnic categories listed in columns below:

- (1) Black, African-American
- (2) Hispanic, Latino, Mexican-American, Puerto Rican
- (3) Asian, Pacific Islander
- (4) American Indian, Eskimo
- (5) Filipino
- (6) White, Caucasian
- (7) Other ethnicity; not falling into other groups

OCCUPATIONAL CATEGORY	(1) Black		(2) Hispanic		(3) Asian		(4) American Indian		(5) Filipino		(6) White		(7) Other Ethnicities	
	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)
Management & Financial														
Professional														
A&E, Science, Computer														
Technical														
Sales														
Administrative Support														
Services														
Crafts														
Operative Workers														
Transportation														
Laborers*														

*Construction laborers and other field employees are not to be included on this page

Totals Each Column														
--------------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Grand Total All Employees

Non-Profit Organizations Only:

Board of Directors														
Volunteers														
Artists														



CITY OF SAN DIEGO WORK FORCE REPORT – ADMINISTRATIVE

HISTORY

The Work Force Report (WFR) is the document that allows the City of San Diego to analyze the work forces of all firms wishing to do business with the City. We are able to compare the firm’s work force data to County Labor Force Availability (CLFA) data derived from the United States Census. CLFA data is a compilation of lists of occupations and includes the percentage of each ethnicity we track (Black, Hispanic, Asian, American Indian, Filipino) for each occupation. Currently, our CLFA data is taken from the 2000 Census. In order to compare one firm to another, it is important that the data we receive from the consultant firm is accurate and organized in the manner that allows for this fair comparison.

WORK FORCE & BRANCH WORK FORCE REPORTS

When submitting a WFR, especially if the WFR is for a specific project or activity, we would like to have information about the firm’s work force that is actually participating in the project or activity. That is, if the project is in San Diego and the work force is from San Diego, we want a San Diego County Work Force Report.¹ By the same token, if the project is in San Diego, but the work force is from another county, such as Orange or Riverside County, we want a Work Force Report from that county.² For example, if participation in a San Diego project is by work forces from San Diego County, Los Angeles County and Sacramento County, we will ask for separate Work Force Reports representing the work forces of each of the three counties.^{1,2} On the other hand, if the

project will be accomplished completely outside of San Diego, we ask for a Work Force Report from the county or counties where the work will be accomplished.²

MANAGING OFFICE WORK FORCE

Equal Opportunity Contracting may occasionally ask for a Managing Office Work Force (MOWF) Report. This may occur in an instance where the firm involved is a large national or international firm but the San Diego or other local work force is very small. In this case, we may ask for both a local and a MOWF Report.^{1,3} In another case, when work is done only by the Managing Office, only the MOWF Report may be necessary.³

TYPES OF WORK FORCE REPORTS:

Please note, throughout the preceding text of this page, the superscript numbers one ¹, two ² & three ³. These numbers coincide with the types of work force report required in the example. See below:

- ¹ One San Diego County (or Most Local County) Work Force – Mandatory in most cases
- ² Branch Work Force *
- ³ Managing Office Work Force

**Submit a separate Work Force Report for all participating branches. Combine WFRs if more than one branch per county*

Exhibit: Work Force Report Job categories

Refer to this table when completing your firm’s Work Force Report form(s).

Management & Financial

Advertising, Marketing, Promotions, Public Relations, and Sales Managers
Business Operations Specialists
Financial Specialists
Operations Specialties Managers
Other Management Occupations
Top Executives

Professional

Art and Design Workers
Counselors, Social Workers, and Other Community and Social Service Specialists
Entertainers and Performers, Sports and Related Workers
Health Diagnosing and Treating Practitioners
Lawyers, Judges, and Related Workers
Librarians, Curators, and Archivists
Life Scientists
Media and Communication Workers

Other Teachers and Instructors
Postsecondary Teachers
Primary, Secondary, and Special Education School Teachers
Religious Workers
Social Scientists and Related Workers

Supervisors, Food Preparation and Serving Workers
Supervisors, Personal Care and Service Workers
Transportation, Tourism, and Lodging Attendants

Architecture & Engineering, Science, Computer

Architects, Surveyors, and Cartographers
Computer Specialists
Engineers
Mathematical Science Occupations
Physical Scientists

Technical

Drafters, Engineering, and Mapping Technicians
Health Technologists and Technicians
Life, Physical, and Social Science Technicians
Media and Communication Equipment Workers

Sales

Other Sales and Related Workers
Retail Sales Workers
Sales Representatives, Services
Sales Representatives, Wholesale and Manufacturing
Supervisors, Sales Workers

Administrative Support

Financial Clerks
Information and Record Clerks
Legal Support Workers
Material Recording, Scheduling, Dispatching, and Distributing Workers
Other Education, Training, and Library Occupations
Other Office and Administrative Support Workers
Secretaries and Administrative Assistants
Supervisors, Office and Administrative Support Workers

Services

Building Cleaning and Pest Control Workers
Cooks and Food Preparation Workers
Entertainment Attendants and Related Workers
Fire Fighting and Prevention Workers
First-Line Supervisors/Managers, Protective Service Workers
Food and Beverage Serving Workers
Funeral Service Workers
Law Enforcement Workers
Nursing, Psychiatric, and Home Health Aides
Occupational and Physical Therapist Assistants and Aides
Other Food Preparation and Serving Related Workers
Other Healthcare Support Occupations
Other Personal Care and Service Workers
Other Protective Service Workers
Personal Appearance Workers

Crafts

Construction Trades Workers
Electrical and Electronic Equipment Mechanics, Installers, and Repairers
Extraction Workers
Material Moving Workers
Other Construction and Related Workers
Other Installation, Maintenance, and Repair Occupations
Plant and System Operators
Supervisors of Installation, Maintenance, and Repair Workers
Supervisors, Construction and Extraction Workers
Vehicle and Mobile Equipment Mechanics, Installers, and Repairers
Woodworkers

Operative Workers

Assemblers and Fabricators
Communications Equipment Operators
Food Processing Workers
Metal Workers and Plastic Workers
Motor Vehicle Operators
Other Production Occupations
Printing Workers
Supervisors, Production Workers
Textile, Apparel, and Furnishings Workers

Transportation

Air Transportation Workers
Other Transportation Workers
Rail Transportation Workers
Supervisors, Transportation and Material Moving Workers
Water Transportation Workers

Laborers

Agricultural Workers
Animal Care and Service Workers
Fishing and Hunting Workers
Forest, Conservation, and Logging Workers
Grounds Maintenance Workers
Helpers, Construction Trades
Supervisors, Building and Grounds Cleaning and Maintenance Workers
Supervisors, Farming, Fishing, and Forestry Workers