






Rogue Workforce Partnership - Corporate Directors Meeting

Friday April 1, 2016 • 11:00 am - 1:00 pm | 100 E. Main Street, Suite A - Board Room • Medford

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Agenda

- | | |
|--|---------------------|
| 1. Call to Order | Jessica Gomez |
| 2. Consent Agenda - <u>Action Item</u>  | Jessica |
| • Approval of Minutes – January 21, 2016 RWP Corporate Directors Meeting | |
| 3. TJC Audit Report - <u>Action Item</u>  | Mark Damon, Sherri, |
| • Closeout Update | |
| 4. RWP Budget Adjustment - <u>Action Item</u>  | Sherri Emitte |
| 5. Local Plan Review, Changes & Approval - <u>Action Item</u>  | Jim |
| 6. RWP Governance Update & Next Steps | Jim |
| 7. RWP Staffing Update | Jim |
| 8. RWP Corporate Director Meeting Schedule | Jessica |
| 9. Other Items | Jessica |
| 10. Adjourn | Jessica |

 = Documents are attached, or will be handed out or presented at meeting



MINUTES

ROGUE WORKFORCE PARTNERSHIP • CORPORATE DIRECTORS

January 21, 2016 ♦ 100 E. Main St., Suite A - Board Room ♦ Medford, OR

MEMBERS PRESENT

Jessica Gomez
Gregg Edwards
Nikki Jones
Commissioner Cheryl Walker (via phone)
Commissioner Rick Dyer
Tamara Nordin
Michael Donnelly

MEMBERS ABSENT

Ron Fox

OTHERS PRESENT

Karen Humelbaugh, Workforce Director, Office of Community Colleges and Workforce Development
Debra Welter, Project Manager, Office of Community Colleges and Workforce Development
Jim Fong, Executive Director, Rogue Workforce Partnership
Sherri Emitte, Rogue Workforce Partnership
Rene' Brandon, Rogue Workforce Partnership
Tami Allison, Rogue Workforce Partnership

Quorum Present: Yes

1) CALL TO ORDER

The meeting was called to order by Chair Jessica Gomez at 11:10 am.

2) ELECT CHAIR AND VICE-CHAIR

COMMISSIONER DYER NOMINATED JESSICA GOMEZ AS CHAIR AND GREGG EDWARDS AS VICE-CHAIR TO SERVICE ANOTHER TERM. THE MOTION WAS SECONDED BY MIKE DONNELLY AND APPROVED UNANIMOUSLY.

3) CONSENT AGENDA

NIKKI JONES MOVED TO APPROVE THE CONSENT AGENDA AS PRESENTED. THE MOTION WAS SECONDED BY MIKE DONNELLY AND APPROVED UNANIMOUSLY.

4) U.S. DEPARTMENT OF LABOR - MONITORING REPORT UPDATE

CCWD was monitored by the USDOL last year and we were part of this monitoring visit. Karen Humelbaugh and Debra Welter, CCWD joined the meeting via video conference. Jim

reviewed the DOL Monitoring/Audit response document with the group. “The expectation of monitoring visits is that monitors will come back with findings and observations from areas they visit,” stated Karen. There is generally followed-up with an extended process in which the state and local region’s respond back-and-forth with DOL to eventually resolve these findings satisfactorily.

The report for this area noted five findings and three concerns, most having to do with our fiscal system challenges that took place in the past, and all issues that have been fully remedied and monitored by CCWD. CCWD will be working with RWP to further document what’s been done to respond to DOL.

The findings and observations were reviewed in full detail with the Corporate Directors. Karen commented that she has requested and received an extension from DOL to submit the response, and it is now due February 19, 2016. The expectation is that this will be a process. Karen concluded by saying that the current CCWD monitoring is going well and that is a good indication of being in good shape with the DOL Review.

5) TJC CLOSEOUT

TJC balance sheet was handed out to the group and reviewed. Sherri indicated that this balance sheet does not reflect \$60,000 from the Endowment Fund on the RWP side. All vehicles have been sold and that a series of things have been liquidated, with Jim as the liquidation agent.

The cash in bank (general) represents non-federal funds built up over many years. Sherri indicated that RWP would like to keep this cash in a separate fund and use for cash flow as needed due to the fact that we are reimbursement based. The Corporate Directors were in consent with this strategy.

6) RWP ENDOWMENT FUND

Fund Update – The Job Council cash flow is freeing up the Endowment Fund to be able to reinvest.

Careers in Gear- Total event estimated at just over \$23,000 with \$15,000 needed to contract with Junior Achievement and College Dreams. The remainder will be in-kind contributions, business donations, vendor table fees, etc. We are estimating a potential shortage of approximately \$8-\$10,000. It was agreed that up to a maximum of \$10,000 could be used to fund the aforementioned shortage.

TAMARA NORDIN MOVED TO REAFFIRM THE CURRENT ENDOWMENT FUND POLICY THAT ALLOWS THE USE OF UP TO 5% OF THE FUND BALANCE PER YEAR, AND THAT WE ALLOW THE USE OF UP TO \$10,000 FOR CAREERS IN GEAR FOR THIS YEAR. THE MOTION WAS SECONDED BY MIKE DONNELLY. DISCUSSION INCLUDED THE SUGGESTION TO REVIEW THE ENDOWMENT FUND POLICY AT THE NEXT MEETING. DISCUSSION ENDED AND THE MOTION WAS APPROVED UNANIMOUSLY.

7) NATIONAL CAREER READINESS CERTIFICATE

Status Update, Short & Long-Term Funding Options / Business Model – Jim reported that there is a very good possibility that the number of NCRC's will double from last year; and that NCRC is helping the high school graduation rate as well as being meaningful in regards to CRLE. College Dreams reported that \$20,000 has been expended to date and many schools are not yet on board, but are very interested in the testing. This would probably cost an additional \$10,000 which creates a need to figure out sustainability within the community, and at what point will the education community begin to contribute? The cost per student is approximately \$22 for the NCRC test and certificate itself. A conversation will take place later this week to confirm the cost for the tests.

Karen indicated that the state is continuing to pay for the tests and the profiling of the businesses; however, due to shifts in governors as well as policy advisors, the general fund has changed a bit, but this could be discussed for the next budget. After more discussion it was determined that Karen and Jessica will sit down and discuss with Elana Pirtle-Guiney, the Governor's Workforce and Labor Policy Advisor, on how to revisit this.

Karen was asked if Sector Strategies funding could be used as a back-stop. Karen suggested using another resource as sector initiatives are bound to take the total budget. Karen added that the focus on the federal side is not in-school youth as it would be unlikely that a youth would move from graduation right into a sector; however, after further discussion, Karen indicated that if we could link NCRC to sector strategies, and complete the sector work we have already committed to, that it would be acceptable.

The group went on to discuss current and future funding for College Dreams in doing the NCRC work. The discussion ended with agreement that \$20,000 would be funded from Sector Strategies. The remaining \$10,000 needed to complete the effort would be funded with \$6,740 from OCF, and the remaining \$3,260 from the Endowment Fund. Sherri noted that the \$10,000 for Careers in Gear along with the \$3,260 for College Dreams NCRC work would still be well within the 5% annual spending limit of the Endowment Fund Policy.

8) RWP WORKFORCE BOARD - NEW MEMBER ORIENTATION

Jim asked the Corporate Directors their thoughts on what would be valuable for new member orientation, as well as referring to links provided on today's agenda. Jim stated that a New Member Orientation handbook was created in the past; however, feedback from a current new member indicated that a one page summary with access to additional information on line would be more appropriate. Jim also invited the Corporate Directors to share in the role of orientation of new members.

9) STRATEGIC PLAN UPDATE

The process is moving forward, with small workgroups convening as well as connecting with local leadership on how RWP can influence outcomes, and targeting customer who have gone through services asking them how ready they felt before coming in versus after receiving services. Also gathering feedback from workshop instructors on curriculum, as well as stakeholder input.

10) SECTOR STRATEGIES & GUIDANCE ON...

Industry Recognized Credentials – A matrix of industry recognized credentials was distributed and reviewed with the group. Jim posed the question, “what of these credentials would local employers feel are valuable?” Jim indicated he will vet with RCC as well, and could see offering some of these certificates through the OneStop. Mike will take the list back to Carestream for feedback.

Industry / Training & Education Partnership Framework- a handout from Brian Shumate was distributed to the group. Jim indicated that he will be following up with Brian in the near future.

College & Career for All – Jim reported that the Stem Hub is being finalized as well as carving out a position to be placed here to drive CRLE’s (Career Related Learning Experiences) with schools, business partners and economic development.

11) OTHER ITEMS

Jim asked the Corporate Directors to think about whether we want to replace Lyndell Smith’s position on the Corporate Directors.

12) ADJOURN

With no further business, the RWP Corporate Directors meeting was adjourned at 1:03 pm.

Respectfully Submitted,

Tami Allison
Executive Projects Manager

Approved
Jessica Gomez, RWP Chair

Date

THE JOB COUNCIL
FINANCIAL STATEMENTS AND
SUPPLEMENTARY INFORMATION
YEAR ENDED JUNE 30, 2015
WITH
INDEPENDENT AUDITOR'S REPORT



THE JOB COUNCIL
Principal Officials
June 30, 2015

Board of Directors

The Job Council Board of Directors is composed of a County Commissioner from each of the two counties served by The Job Council, as well as selected members of the Rogue Workforce Partnership.

Commissioner Rick Dyer
Jackson County Courthouse
10 South Oakdale, Room 200
Medford, Oregon 97501
541-774-6118

Commissioner Cherryl Walker
Josephine County Courthouse
500 NW 6th Street
Grants Pass, Oregon 97526
541-474-5221

Jessica Gomez, Chair
Owner, Rogue Valley Microdevices
943 Automation Way, Suite F
Medford, Oregon 97504
541-774-1900

Gregg Edwards, Vice-Chair
Chief People Officer, ASANTE
2650 Siskiyou Blvd
Medford Oregon 97504
541-789-4673

Nikki Jones
Owner, Express Professionals, Inc.
Medford and Grants Pass, Oregon

Lyndell Smothers
HR Manager, Fire Mountain
Gems & Beads
Grants Pass, Oregon

Tamara Nordin
VP Human Resources
Pacific Retirement Services
Medford, Oregon

Ron Fox
Executive Director
SOREDI
Medford, Oregon

Michael Donnelly
Materials & Facilities Manager
Carestream Health, Inc.
White City, Oregon

THE JOB COUNCIL
Principal Officials (continued)
June 30, 2015

Rogue Workforce Partnership

Rogue Workforce Partnership includes representatives of business, education, labor, economic development, the employment department, vocational rehabilitation, and community-based organizations who, together with the Board of Directors, guide the direction of employment and training programs in the two counties served by The Job Council.

Peter Angstadt
Rogue Community College
Medford and Grants Pass, Oregon

Chris Cahill
Hunter Communication
Medford, Oregon

John Higgins
Grants Pass School District #7
Grants Pass, Oregon

Michael Donnelly
Carestream Health, Inc
White City, Oregon

Gregg Edwards - Vice Chair
ASANTE Health Systems
Medford, Oregon

Jim Fong
The Job Council/RWP
Medford, Oregon

Ron Fox
SORED
Medford, Oregon

Jessica Gomez - Chair
Rogue Valley Microdevices
Medford, Oregon

Tanya Haakinson
Sierra Pine Medite Division
Medford, Oregon

Fred Holloway
Holloway Consulting
Medford, Oregon

Nikki Jones
Express Professionals, Inc.
Medford and Grants Pass, Oregon

Pete Karpa
Office of Vocational
Rehabilitation Services
Medford and Grants Pass, Oregon

Brent Kell
Valley Immediate Care
Medford, Oregon

Michael Kidwell
VA So. Or. Rehabilitation
Centers & Clinic
White City, Oregon

Sherri Stratton
Oregon Employment Department
Medford and Grants Pass, Oregon

Scott Koch
Sterling Bank
Medford, Oregon

Tolga Latif
Linx Technologies
Merlin, Oregon

Wes Brain
Retired SEIU, Labor Rep
Ashland, Oregon

THE JOB COUNCIL
Principal Officials (continued)
June 30, 2015

Rogue Workforce Partnership, continued

Doug Mares
Department of Human Services
Medford and Grants Pass, Oregon

Barbara Perkins
Lithia Motors
Medford, Oregon

Rick Dyer
Jackson County Commissioner
Medford, Oregon

Teresa Sayre
Phoenix/Talent School District
Phoenix, Oregon

Cherryl Walker
Josephine County Commissioner
Grants Pass, Oregon

Tamara Nordin
Pacific Retirement Services
Medford, Oregon

Jon Flegel
IBEW 659
Central Point, Oregon

Scott Beveridge
Southern Oregon ESD
Medford, Oregon

Lyndell Smothers
Fire Mountain Gems & Beads
Grants Pass, Oregon

**THE JOB COUNCIL
Medford, Oregon
Year Ended June 30, 2015**

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INDEPENDENT AUDITOR'S REPORT

To the Board of Directors
The Job Council
Medford, Oregon

We have audited the accompanying financial statements of the governmental activities, the major fund, and the aggregate remaining fund information of The Job Council as of and for the year ended June 30, 2015, and the related notes to the financial statements, which collectively comprise The Job Council's basic financial statements as listed in the table of contents.

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 opinions 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 and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from 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 opinions.

Opinions

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, the major fund, and the aggregate remaining fund information of The Job Council, as of June 30, 2015, and the respective changes in financial position thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Emphasis of Matters

As discussed in note 2 to the financial statements, The Job Council adopted new accounting standards, GASB Statement No. 68, *Accounting and Financial Reporting for Pensions* and GASB Statement No. 71, *Pension Transition for Contributions Made Subsequent to the Measurement Date*. Our opinion is not modified with respect to this matter.

As discussed in note 1 to the financial statements, the 2014 financial statements have been restated to correct a misstatement associated with the under-reporting of the Oregon Public Employees Retirement System transition liability. Our opinion is not modified with respect to this matter.

As discussed in note 1 and 14 to the financial statements, as a result of the terminated intergovernmental entity agreement, The Job Council ceased operations effective June 30, 2015. Our opinion is not modified with respect to this matter.

Other Matters

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis, the general fund budgetary comparison information, and certain pension schedules as listed in the table of contents be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to management's discussion and analysis and pension schedules in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance. The general fund budgetary comparison information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the general fund budgetary comparison information is fairly stated, in all material respects, in relation to the basic financial statements as a whole.

Other Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise The Job Council's basic financial statements. The schedule of expenditures of federal awards is presented for purposes of additional analysis as required by U.S. Office of Management and Budget Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*, and is also not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relate directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the schedule of expenditures of federal awards is fairly stated in all material respects in relation to the basic financial statements as a whole.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated March 16, 2016, on our consideration of The Job Council's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering The Job Council's internal control over financial reporting and compliance.

Other Reporting Required by Oregon State Regulations

In accordance with Oregon State Regulation, we have also issued our report dated March 16, 2016 on our consideration of The Job Council's compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes (ORS) as specified in Oregon Administrative Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations. The purpose of that report is to describe the scope of our testing necessary to address the required provisions of ORS, and not to provide an opinion on compliance with such provisions.



Mark Damon, CPA, Partner
KDP Certified Public Accountants, LLP
Medford, Oregon
March 16, 2016

MANAGEMENT'S DISCUSSION AND ANALYSIS

THE JOB COUNCIL
Management's Discussion and Analysis
June 30, 2015

As management of The Job Council, we offer readers of The Job Council's financial statements this narrative overview and analysis of the financial activities of The Job Council for the fiscal year ended June 30, 2015.

Financial Highlights

- Revenue sources increased by \$670,361, or 12% from fiscal 2014 figures.
- WIA Program-based revenues increased by \$373,688, a 15% increase from the previous program year. This increase in reimbursements was due, in large part, by our being able to once again replenish staff positions that had previously been left vacant, as well as the ability to provide additional client training.
- Funding supporting JOBS/TANF/FS&C/OFFSET programs increased by \$216,611, or 14%. This increase is primarily due to an increase in state funding resources for additional activities.
- The Job Council experienced an increase in other grant funding of \$80,062 representing a 5.2% increase from fiscal 2014 funding. This was due to some additional grant activity seen during the year.

Overview of the Financial Statements

This discussion and analysis is intended to serve as an introduction to The Job Council's basic financial statements. The statements are comprised of three components: 1) government-wide financial statements, 2) fund financial statements, and 3) notes to the financial statements. This report also contains other supplementary information in addition to the basic financial statements.

Government-wide financial statements:

The government-wide financial statements are designed to provide readers with a broad overview of The Job Council's finances, in a manner similar to a private-sector business. These statements provide information about the activities of The Job Council as a whole and present a longer-term view of The Job Council's finances.

The government-wide financial statements include all non-fiduciary assets and liabilities using the accrual basis of accounting, which is similar to the accounting used by most private-sector business. All of the current year's revenues and expenses are taken into account regardless of when cash is received or paid.

These two statements report The Job Council's net position and changes to them. Net position (the difference between assets and liabilities) is one way to measure an organization's financial health. Changes in net position over time provide one indicator of whether financial health is improving or deteriorating.

Fund financial statements:

Fund financial statements report The Job Council's operations in more detail than the government-wide financial statements, and may also give you some insights into The Job Council's overall health. The Job Council has two types of funds.

1. Governmental Funds:

These funds are reported using the modified accrual basis of accounting. The governmental fund statements provide a detailed short-term view of The Job Council's operations. The relationship (differences) between governmental activities (reported in the statement of net position and the statement of activities) and governmental funds is described in reconciliations after the fund financial statements.

THE JOB COUNCIL
Management's Discussion and Analysis
June 30, 2015

Overview of the Financial Statements, continued

2. Fiduciary Fund (Agency):

The Job Council is the fiduciary for assets that belong to the Rogue Workforce Partnership (RWP). The Job Council is responsible for ensuring that the assets reported in this fund are used for the intended purposes. All of The Job Council's fiduciary activities are reported in a separate statement of fiduciary net position. During 2014, the Organization borrowed (with the approval of RWP's Board) certain funds. These amounts are reported as a liability in the Statement of Net Position and Balance Sheet.

Notes to the financial statements:

The notes provide additional information that is essential for a full understanding of the information provided in the government-wide and fund financial statements. They are an integral part of the financial statements and should be read in conjunction with them.

Our auditor has provided assurance in the Independent Auditor's Report, located immediately preceding this Management's Discussion and Analysis, that the Basic Financial Statements are fairly presented in all material respects. A user of this report should read the Independent Auditor's Report carefully to ascertain the level of assurance being provided for each of the other parts of the Financial Section.

Financial Analysis of The Job Council as a Whole

Net Position: The Job Council's combined net position (deficit) as of June 30, 2015 was (\$4,214,293). (See Table A below).

Change in Net Position: The Job Council's net position increased by \$1,083,790 from the previous fiscal year. (See Table B on the following page). Note that within these two tables is a prior period adjustment due to the PERS transition liability not previously recorded, and the implementation of GASB 68. (See Notes 1, 2, and 9 of the Notes to the Financial Statements). The increase in net position can primarily be attributed to net pension income recognized during 2015. The income was the result of positive performance at the PERS level during the measurement period.

Table A
The Job Council's Net Position

	2015	2014 (As Restated)
Current and other assets	\$ 2,023,891	\$ 1,758,737
Capital assets	1,659	13,138
Deferred outflows of resources	242,566	243,940
Total Assets	2,268,116	2,015,815
Current and other liabilities	759,243	2,577,116
Long-term liability related to pensions	4,600,239	4,736,782
Deferred inflows of resources	1,122,927	-
Total Liabilities	6,482,409	7,313,898
Net Position		
Invested in capital assets	1,659	13,138
Unrestricted	(4,215,952)	(5,311,221)
Total Net Position	\$ (4,214,293)	\$ (5,298,083)

THE JOB COUNCIL
Management's Discussion and Analysis
June 30, 2015

Financial Analysis of The Job Council as a Whole, continued

Table B
The Job Council's Change in Net Position

	<u>2015</u>	<u>2014</u>
Governmental Activities		
Program Revenues		
Operating grants, program services and contributions	\$ 6,116,540	\$ 5,369,584
General Revenues, by Source		
Other general revenues	<u>208,900</u>	<u>285,495</u>
Total Revenues	<u>6,325,440</u>	<u>5,655,079</u>
Program Expense:		
Employment and training	<u>5,241,650</u>	<u>5,626,199</u>
Total Expenses	<u>5,241,650</u>	<u>5,626,199</u>
Change in Net Position	1,083,790	28,880
Net Position, Beginning of Year	504,926	476,046
Prior Period Adjustment	<u>(5,803,009)</u>	<u>-</u>
Net Position, End of Year	<u>\$ (4,214,293)</u>	<u>\$ 504,926</u>

Budgetary Highlights

The Job Council is exempt from the general requirements of Oregon Local Budget Law, but as a Council of Governments it is required to adopt a budget for its General Fund under the specific provisions of ORS 294.905 through 294.930. No formal budget adjustments have been made through the year as Councils of Governments have no legal requirement to do so. The Job Council does however maintain ongoing budgetary controls to ensure compliance with the actual annual appropriated grant budgets approved by the Board.

The Local Board of Directors approved the budget in June 2014. Based on the fact that our federal and state revenues are not fully known at the time of adoption, The Job Council develops the budget with preliminary estimates based on historical trends and available data. As would be expected, there are some variations once the final figures are fully known. Below is a brief summary of those changes:

- WIA Program-based revenues were \$570,566 less than initial budget estimates.
- JOBS/TANF/FS&C/OFSET revenues were \$97,200 less those projected in the original budget.
- Child Care funding was \$17,781 more than initial budget estimates.
- Other revenues were \$136,931 more than initial budget estimates.

THE JOB COUNCIL
Management's Discussion and Analysis
June 30, 2015

Capital Asset Administration

Total capital assets, net of accumulated depreciation, were \$1,659 at June 30, 2015. The Job Council's capital assets were substantially acquired from expenditures in the General Fund. Their function and activity are for grant-related functions. For more detailed information on capital asset activity, please see Notes 1 and 5 in the Notes to Financial Statements.

Economic Factors and Next Year's Budgets and Rates

As described in Notes 1 and 14, The Job Council ceased operations effective June 30, 2015, as a result of an amended intergovernmental entity agreement. Among the provisions of the amendment, The Job Council's Board was given authority to appoint a liquidating agent for the purpose of winding down operations. Wind-down activity is still ongoing.

Requests for Information

This financial report is designed to provide interested parties with a general overview of The Job Council's finances and to demonstrate The Job Council's accountability for the funds it receives. If you have questions about this report or need additional financial information, contact The Job Council's Administrative Office, 100 E. Main Street, Suite A, Medford, OR 97501.

BASIC FINANCIAL STATEMENTS

**THE JOB COUNCIL
STATEMENT OF NET POSITION
JUNE 30, 2015**

	<u>Governmental Activities</u>
ASSETS AND DEFERRED OUTFLOWS OF RESOURCES:	
Cash and investments	\$ 104,595
Receivables:	
State of Oregon	872,688
Child care	168,751
Other receivables	278,006
Prepaid items	<u>17,901</u>
Total Current Assets	<u>1,441,941</u>
Net pension asset	581,950
Capital assets (net of accumulated depreciation)	<u>1,659</u>
TOTAL ASSETS	<u>2,025,550</u>
Deferred outflows of resources:	
Deferred amounts related to pensions	<u>242,566</u>
TOTAL ASSETS AND DEFERRED OUTFLOWS OF RESOURCES	<u><u>\$ 2,268,116</u></u>
LIABILITIES AND DEFERRED INFLOWS OF RESOURCES:	
Accounts payable	\$ 154,892
Accrued payroll liabilities	211,605
Unearned revenue	10,356
Due to RWP (related party)	<u>382,390</u>
Total Current Liabilities	<u>759,243</u>
Long-term liability related to pensions (transition liability)	<u>4,600,239</u>
TOTAL LIABILITIES	<u>5,359,482</u>
Deferred inflows of resources:	
Deferred amounts related to pensions	<u>1,122,927</u>
TOTAL LIABILITIES AND DEFERRED INFLOWS OF RESOURCES	<u>6,482,409</u>
NET POSITION:	
Net investment in capital assets	1,659
Unrestricted	<u>(4,215,952)</u>
TOTAL NET POSITION	<u><u>\$ (4,214,293)</u></u>

**THE JOB COUNCIL
STATEMENT OF ACTIVITIES
YEAR ENDED JUNE 30, 2015**

Functions/Programs	Expenses	Program Revenues		Net (Expense) Revenue and Change In Net Position
		Charges for Services	Operating Grants and Contributions	
Governmental activities:				
Employment and training	<u>\$ 5,241,650</u>	<u>\$ -</u>	<u>\$ 6,116,540</u>	<u>\$ 874,890</u>
	General revenues:			
	Other general revenues			<u>208,900</u>
	Total general revenues			<u>208,900</u>
	CHANGE IN NET POSITION			<u>1,083,790</u>
	Net Position - beginning			504,926
	Prior period adjustment			<u>(5,803,009)</u>
	Net position - beginning, as restated			<u>(5,298,083)</u>
	Net Position - June 30, 2015			<u><u>\$ (4,214,293)</u></u>

FUND FINANCIAL STATEMENTS

**THE JOB COUNCIL
BALANCE SHEET
GOVERNMENTAL FUND
JUNE 30, 2015**

	General Fund
	<hr/>
ASSETS:	
Cash and investments	\$ 104,595
Receivables:	
State of Oregon	872,688
Child care	168,751
Other receivables	278,006
Prepaid items	<hr/> 17,901
TOTAL ASSETS	<hr/> \$ 1,441,941 <hr/>
LIABILITIES AND FUND BALANCES:	
Liabilities:	
Accounts payable	\$ 154,892
Accrued payroll liabilities	211,605
Unearned revenue	10,356
Due to RWP	<hr/> 382,390
TOTAL LIABILITIES	<hr/> 759,243 <hr/>
Fund Balances:	
Nonspendable	17,901
Unassigned	<hr/> 664,797
TOTAL FUND BALANCES	<hr/> 682,698 <hr/>
TOTAL LIABILITIES AND FUND BALANCES	<hr/> \$ 1,441,941 <hr/>

**THE JOB COUNCIL
RECONCILIATION OF GOVERNMENTAL FUND
BALANCE SHEET TO STATEMENT OF NET POSITION
JUNE 30, 2015**

TOTAL FUND BALANCES		\$ 682,698
Capital assets are not financial resources and therefore are not reported in the governmental funds:		
Cost	\$ 560,921	
Accumulated depreciation	<u>(559,262)</u>	1,659
Net pension asset		581,950
Deferred outflows of resources related to pensions		242,566
Long- term liabilities not payable in the current year are not reported as governmental fund liabilities.		
These liabilities consist of:		
Deferred inflows of resources related to pensions		(1,122,927)
Long-term liability related to pension (transition liability)		<u>(4,600,239)</u>
TOTAL NET POSITION		<u><u>\$ (4,214,293)</u></u>

**THE JOB COUNCIL
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
GOVERNMENTAL FUND
YEAR ENDED JUNE 30, 2015**

	General Fund
	<hr/>
REVENUES	
WIA	\$ 2,935,059
TANF/JOBS/FS&C/OFFSET grants	1,759,115
Child care grants	470,721
Other grants and contracts	951,644
Rental income	127,905
Other	80,995
	<hr/>
TOTAL REVENUES	6,325,439
	<hr/>
EXPENDITURES	
Employment and training:	
Personal services	3,877,287
Material and services	912,154
Travel and training	29,256
Client services	1,497,870
	<hr/>
TOTAL EXPENDITURES	6,316,567
	<hr/>
NET CHANGE IN FUND BALANCE	8,872
	<hr/>
FUND BALANCE, July 1, 2014	673,826
	<hr/>
FUND BALANCE, June 30, 2015	\$ 682,698
	<hr/> <hr/>

**THE JOB COUNCIL
RECONCILIATION OF THE STATEMENT OF REVENUES, EXPENDITURES
AND CHANGES IN FUND BALANCE OF GOVERNMENTAL FUND
TO THE STATEMENT OF ACTIVITIES
YEAR ENDED JUNE 30, 2015**

NET CHANGE IN FUND BALANCE	\$ 8,872
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Amounts reported for governmental activities in the Statement of Activities are different because:

Government funds report capital outlay as expenditures. However, in the Statement of Activities the cost of those assets is allocated over their estimated useful lives and reported as depreciation expense. This is the amount by which depreciation exceeded capital outlays in the current period.

Current year depreciation	(11,479)
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Compensated absences are recognized as an expenditure in the governmental funds when they are paid. In the Statement of Activities compensated absences are recognized as an expenditure when earned.

182,039

Governmental funds report pension contributions as expenditures. In the Statement of Activities, the cost of pension benefits earned net of employee contributions is reported as pension (expenses)/income.

767,815

Governmental funds report pension transition liability payments as expenditures. In the Statement of Activities, the contributions reduce the liability during the period are not recorded as expense.

<u>136,543</u>

CHANGE IN NET POSITION	<u><u>\$ 1,083,790</u></u>
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**THE JOB COUNCIL
STATEMENT OF NET POSITION
FIDUCIARY FUND
YEAR ENDED JUNE 30, 2015**

	<u>Agency Fund</u>
ASSETS:	
Due from general fund	\$ 382,390
TOTAL ASSETS	<u><u>\$ 382,390</u></u>
LIABILITIES AND FUND BALANCES	
Liabilities:	
Due to other groups	\$ 382,390
TOTAL LIABILITIES	<u><u>\$ 382,390</u></u>

NOTES TO BASIC FINANCIAL STATEMENTS

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 1 - Summary of Significant Accounting Policies

The Reporting Entity

The Job Council (the Organization) was formed in April 1975 by an intergovernmental agreement between the governments of Jackson and Josephine Counties to provide job training. The Organization has carried out various iterations of federal workforce programs over the years. The Workforce Investment Act (WIA), was signed into law in 1998. The Rogue Workforce Partnership (RWP) is a local “workforce investment board” as required by the WIA and, as such, provides oversight over the Organization.

The Organization, an intergovernmental entity, is governed by a Board of Directors composed of one Commissioner of each county, as well as selected members of the Rogue Workforce Partnership. The Board is responsible for all funds received and makes policy and major program decisions. The primary purpose of the Organization is to receive and administer funds provided under the WIA through the State of Oregon. The Organization acts as a consortium of cooperating governmental units as authorized under the WIA and Chapter 190 of the Oregon Revised Statutes (ORS).

On July 25, 2013, the Office of the Governor State of Oregon issued executive order No. 13-08 in which Local Workforce Investment Boards were re-charged with various tasks. In addition, as part of the re-chartering process, Local Workforce Investment Boards such as Rogue Workforce Partnership (RWP) are to become neutral, independent brokers of workforce services by July 1, 2015, purchasing services from those equipped to deliver the best possible results.

On July 22, 2014, the Workforce Innovation and Opportunity Act (WIOA) was signed into law. Many of the WIOA provisions became effective on July 1, 2015, the first full program year after enactment, while others will be effective July 1, 2016. For example, the WIA State and local plans remain in effect for PY 2015 (fiscal 2016). In addition, the WIA performance accountability section remains in effect for PY 2015, with the new WIOA performance accountability provisions taking effect at the beginning of PY 2016 (fiscal 2017). WIOA contain provisions with regard to a competitive process to be used to award the sub-grants and contracts in the local area for activities carried out under WIOA.

As a result of the Governor’s order, and certain provisions contained in WIOA, it was determined by the RWP Board that RWP must become totally independent of the Organization, and it was determined by the Organization’s board that it would be difficult to compete in a “competitive process” for the services associated with the WIOA due to the Organization’s high employee benefit costs. In response to this concern, the Organization engaged in conversations with both Jackson and Josephine County regarding potential solutions associated with the intergovernmental agreement and the changes associated with the executive order and the WIOA. After careful consideration, on December 18, 2014, Jackson County terminated the amended and restated intergovernmental entity agreement effective June 30, 2015.

On June 30, 2015, the intergovernmental agreement with Jackson and Josephine County was amended. Among other provisions, the amendment gave authority to The Job Council’s Board to appoint a liquidating agent for the purpose of winding down operations. In addition, the liquidating agent has the authority to transfer assets, with or without consideration, to an organization that has a similar mission.

As a result of the terminated intergovernmental entity agreement, the Organization ceased operations effective June 30, 2015. The Organization is currently working through the liquidation process.

The Organization has no component units and is not itself a component unit of any other governmental entity.

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 1 - Summary of Significant Accounting Policies (continued)

Basis of Presentation

The financial statements of the Organization have been prepared in conformity with accounting principles generally accepted in the United States of America (GAAP) as applied to governments units. The Governmental Accounting Standards Board (GASB) is the accepted standard-setting body for establishing governmental accounting and financial reporting principles.

Government-Wide Financial Statements

The statement of net position and the statement of activities display the information about non-fiduciary activities of the Organization.

The statement of activities demonstrates the degree to which the expenses are offset by program revenues. All revenues and expenses relate to employment and training activities. Direct expenses are those clearly identifiable with employment and training activities. Program revenues are primarily grant and contract revenues that are restricted to meeting operational requirements. Other items not included among program revenues are reported as general revenues.

Fund Financial Statements

The fund financial statements provide information about the Organization's funds. Separate statements for each fund category are presented. The emphasis of fund financial statements is on the General Fund.

The Organization reports the following major governmental fund:

General Fund – This fund accounts for all activities of the Organization. Its primary purpose is to account for the employment training and placement activities of the Organization and other related federal and state grants and the administration of the grant programs. The primary source of funding is WIA grant proceeds received through the State of Oregon from the U.S. Department of Labor. Activities of the Organization also include other state funding, certain non-grant revenues, interest earnings, and miscellaneous revenues and all non-grant expenditures.

Additionally, the Organization reports the following fund types:

Fiduciary Fund – This fund is used to account for the activity of the Rogue Workforce Partnership in the Organization's capacity as its fiscal and administrative agent. Assets held in this fund consist of funds held on behalf of the RWP to fund future projects designed to develop the region's workforce to meet the highest international standards and to support workforce development efforts.

Measurement Focus and Basis of Accounting

Government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded at the time liabilities are incurred, regardless of when the related cash flows take place. Non-exchange transactions, in which the Organization receives value without giving equal value in exchange, include grants, entitlements, and donations. Revenue from grants, entitlements and donations are recognized in the fiscal year in which all eligibility requirements imposed by the provider have been met. Under terms of grant agreements, the Organization funds certain programs by a combination of specific cost-reimbursement grants and general revenues. Thus, when program expenses are incurred there are both restricted and unrestricted net assets available to finance the programs and then general revenues. It is the Organization's policy to first apply cost-reimbursement grant resources to such programs and then general revenues.

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 1 - Summary of Significant Accounting Policies (continued)

Measurement Focus and Basis of Accounting (continued)

Governmental fund financial statements are reported using the current financial resources measurement focus and modified accrual basis of accounting. Under this method, revenues are recognized when measurable and available. The Organization considers all revenues reported in the governmental funds to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the Organization considers revenues to be available if they are collected within 60 days of the end of the current fiscal period. Expenditures are recorded when the related fund liability is incurred, as under accrual accounting, with certain exceptions.

Grant revenues are recognized under cost reimbursement contracts. For cost reimbursement contracts, revenues are considered measurable and available when the expenditures related to the programs have been incurred.

The major differences between the modified accrual basis and the accrual basis for the Organization revolve around capital outlay, accumulated compensated absences, and pension related activity. Under the modified accrual basis, capital outlay, compensated absences, and pension contributions/obligations are recognized as expenditures when the Organization pays for such activity.

Deferred Outflows/Inflows of Resources

In addition to assets, the statement of financial position will report a separate section for deferred outflows of resources. This separate financial statement element, deferred outflows of resources, represents a consumption of net position that applies to a future period(s) and so will not be recognized as an outflow of resources (expense/expenditure) until then. The Organization has only one type of deferred outflow, which arises under the full accrual basis of accounting that qualifies for reporting in this category. Accordingly, the item, deferred outflows related to pensions, is reported in the government-wide financial statements. Deferred outflows related to pensions is explained more fully in Note 8.

In addition to liabilities, the statement of net position will sometimes report a separate section for deferred inflows of resources. This separate financial statement element, deferred inflows of resources, represents an acquisition on net position that applies to a future period and so will not be recognized as an inflow of resources (revenue) until that time. The Organization has only one type of deferred inflow, which arises under the full accrual basis of accounting that qualifies for reporting in this category. Accordingly, the item, deferred inflows related to pensions, is reported in the government-wide financial statements. Deferred inflows related to pensions is explained more fully in Note 8.

Cash, Cash Equivalents and Investments

The Organization's cash and cash equivalents consist of cash on hand, demand deposits, money market checking accounts, and short-term investments with original maturities of three months or less from the date of acquisition. Short-term investments are stated at cost which approximates fair value.

As required by state law, the Organization secures its deposits in banks with federal depository insurance and through a financial institution collateral pool.

Oregon Revised Statutes 294.035 authorizes the Organization to invest in obligations of the United States and its agencies, certain states and municipalities, certificates of deposit, savings accounts, repurchase agreements, banker acceptances, commercial paper, and the State of Oregon Treasurer's Local Government Investment Pool (LGIP).

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 1 - Summary of Significant Accounting Policies (continued)

Accounts and Other Receivables

Receivables are recorded on the statement of net position and the balance sheet in accordance with the policies enumerated above.

Management of the Organization considers all amounts included in accounts and grants receivable to be collectible. Therefore, no provision for uncollectible accounts has been made.

Grants

Unreimbursed grant expenditures due from grantor agencies are reflected in the basic financial statements as receivables and revenues. Grant revenues are recorded at the time eligible expenditures are incurred. Grant monies received prior to the occurrence of qualifying expenditures are recorded as unearned revenue.

Capital Assets

Capital assets are reported in the government-wide financial statements. Capital assets are defined by the Organization as assets with an initial individual cost of \$5,000 or more and an estimated useful life in excess of one year. Such assets are recorded at historical cost. Currently, the Organization's capital assets consist of equipment, fixtures and furniture, and leasehold improvements. Maintenance and repairs of capital assets are charged to expense/expenditures as incurred.

All capital assets of the Organization were purchased with federal or state grants. The federal government retains a reversionary interest in capital assets purchased with federal grant monies.

Depreciation is reported in the statement of activities and is calculated using the straight-line method over the following estimated useful lives:

Leasehold improvements	–	40 Years
Furniture and fixtures	–	15 Years
Equipment	–	3 to 7 Years

Retirement Plan

All qualified employees of the Organization are participants in Oregon Public Employees Retirement System (PERS). Contributions to PERS are charged to expense/expenditures in the same period as the related payroll cost.

Compensated Absences

It is the Organization's policy to permit employees to accumulate earned but unused personal leave. All unused personal leave is accrued when earned in the government-wide financial statements. A liability is recorded in the Statement of Net Position as the amount of vested personal leave earned but unexpended at June 30, 2015. The liability is reduced as employees use the leave or terminate. All accumulated earned unused personal leave was paid in full as of June 30, 2015.

Unearned Revenue

The Organization reports unearned revenue on the Statement of Net Position at fiscal year-end.

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 1 - Summary of Significant Accounting Policies (continued)

Due to Agency Fund (RWP)

During 2014, the Organization borrowed certain funds from the Fiduciary Fund to finance operations. These amounts are reported as a liability in the Statement of Net Position and Balance Sheet.

Restatement of Prior Year Amounts

During the year ended June 30, 2015, the Organization determined the prior period needed to be restated due to the transition liability related to the Organization joining the PERS State and Local Government Rate Pool which was not previously recorded. Further information about this liability can be found in Note 9. The result was a net over-reporting of unrestricted net assets of \$4,736,782.

Net Position and Fund Balance

In the government-wide financial statements, equity is classified as net position and displayed in three components:

1. Net investments in capital assets – consist of net capital assets reduced by outstanding balances of any related debt obligations and deferred inflows of resources attributable to the acquisition, construction, or improvement of those assets and increase by balances of deferred outflows of resources related to those assets.
2. Restricted net position – net position is considered restricted if their use is constrained to a particular purpose. Restrictions are imposed by external organizations such as federal or state laws. Restricted net position is reduced by liabilities and deferred inflows or resources related to the restricted assets.
3. Unrestricted net position – consists of all other net position that does not meet the definition of the above two components and is available for general use by the Organization.

In the fund financial statements, governmental fund equity is classified in the flowing categories:

Non-Spendable – Includes items not immediately converted to cash, such as prepaid items and inventory.

Restricted – Includes items that are restricted by external creditors, grantors or contributors, or restricted by legal constitutional provisions.

Committed – Includes items committed by the Organization, by formal action.

Assigned – Includes items assigned for specific uses, authorized by the Executive Director and/or Director of Administration.

Unassigned – This is the residual classification used for those balances not assigned to another category.

Budget

The Organization is exempt from the general requirements of Oregon Local Budget Law, but as a Council of Governments it is required to adopt a budget for its General Fund under the specific provisions of ORS 294.905 through 294.930. No budget is adopted for the Agency Funds.

The Organization did not adopt a budget for its fiscal year ended June 30, 2016 as a result of the terminated intergovernmental agreement (ceased operations effective June 30, 2015).

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 1 - Summary of Significant Accounting Policies (continued)

Use of Estimates

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

Note 2 - New Pronouncements

For the year ending June 30, 2015, the Organization implemented GASB Statement No. 68, *Accounting and Financial Reporting for Pensions* and GASB Statement No. 71, *Pension Transition for Contributions Made Subsequent to the Measurement Date*. Both GASB 68 and GASB 71 were effective for financial statement periods beginning after June 15, 2014. GASB 68 replaces the requirements of GASB Statement No. 27, *Accounting for Pensions by State and Local Governmental Employers*, as well as the requirements of Statement No. 50, *Pension Disclosures*, as they relate to pensions that are provided through pension plans administered as trusts or equivalent arrangements that meet certain criteria. GASB 71 amends GASB 68 to provide clarification of pension contributions made subsequent to the measurement date. The primary objective of both statements is to improve accounting and financial reporting by state and local governments for pensions.

The implementation of GASB 68 resulted in a restatement of beginning net position in order to recognize the Organization's proportionate share of the net pension asset and corresponding deferred outflows and inflows. The result of the restatement was a \$1,066,227 reduction in the beginning net position for governmental activities.

Note 3 - Equity in Pooled Cash and Investments

A reconciliation of cash and investments as are presented in the financial statements as follows:

Carrying amounts of cash and investments:

	Governmental Fund
Deposits with financial institutions:	
Demand Deposits	\$ 104,595
 Total cash and cash equivalents	 \$ 104,595

Deposits - The Governmental Accounting Standards Boards has adopted accounting principles generally accepted in the United States of America (GAAP), which include standards to categorize deposits to give an indication of the level of custodial credit risk assumed by the Organization at June 30, 2015. If bank deposits at year end are not entirely insured or collateralized with securities held by the Organization or by its agent in the Organization's name, the Organization must disclose the custodial credit risk that exists. Deposits with financial institutions are comprised of bank demand deposits. For deposits in excess of federal depository insurance currently limited to balances less than \$250,000; Oregon Revised Statue 295 effective July 1, 2008 created a multiple financial institution collateral pool and eliminated Certificates of Participation. As a result, all balances over the \$250,000 are collateralized. For the fiscal year ended June 30, 2015, the Organization's deposits with various financial institutions had a bank value of \$222,554. The balance of these deposits was covered by both the federal depository insurance, as well as by the State of Oregon shared liability structure for participating bank depositories of Oregon.

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 3 - Equity in Pooled Cash and Investments (continued)

Effective July 1, 2008, House Bill 2901 created a shared liability structure for participating bank depositories in Oregon. Barring any exceptions, a qualifying bank depository is required to pledge collateral valued at least 10% of their quarter-end public fund deposits if they are well capitalized, 25% of the quarter-end public fund deposits if they are adequately capitalized, or 110% of the quarter-end public fund deposits if they are undercapitalized or assigned to pledge 110% by the Office of State Treasurer. In the event of a bank failure, the entire pool of collateral pledged by all qualified Oregon public bank depositories is available to repay the deposits of public funds of governmental entities.

Custodial Credit Risk - Custodial credit risk for deposits is the risk that, in the event of a bank failure, a government's deposits may not be returned to it. The Organization does not have a formal deposit policy for custodial credit risk.

Note 4 - Receivables from the State of Oregon

The Organization receives federal funds from the U.S. Department of Labor and the U.S. Department of Health and Human Services passed through the State of Oregon. The amounts receivable represent contract billings and cash requests relating to expenditures incurred through the end of the program year which had not been received as of June 30, 2015.

Note 5 - Capital Assets

The changes in capital assets for the year ended June 30, 2015, are as follows:

	Balance 6/30/2014	Additions	Deletions	Balance 6/30/2015
Governmental activities				
Capital assets				
Equipment	\$ 594,818	\$ -	\$ (33,897)	\$ 560,921
Total capital assets	594,818	-	(33,897)	560,921
Accumulated depreciation				
Equipment	(581,680)	(11,479)	33,897	(559,262)
Total accumulated depreciation	(581,680)	(11,479)	33,897	(559,262)
Capital assets, net of accumulated depreciation	<u>\$ 13,138</u>	<u>\$ (11,479)</u>	<u>\$ -</u>	<u>\$ 1,659</u>

Note 6 - Operating Leases

The Organization was committed under various operating leases. The most significant operating leases were 100 E. Main Street, 35 S. Bartlett Street, and 1569 NE F Street.

On June 18, 2015 the 100 E. Main Street lease was assigned to RWP (effective date of July 1, 2015) by executing a lease assignment and assumption agreement with the lessor. As a result, the Organization was released and discharged from all liabilities and obligations under the lease accruing from and after the effective date of the assignment.

On June 12, 2015 the 35 S. Bartlett lease was assigned to RWP (effective date of July 1, 2015) by executing a lease assignment and assumption agreement with the lessor. As a result, the Organization was released and discharged from all liabilities and obligations under the lease accruing from and after the effective date of the assignment.

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 6 - Operating Leases (continued)

Subsequent to June 30, 2015, on July 1, 2015, the NE F Street lease was assigned to assumption agreement with the lessor. As a result, the Organization was released and discharged from all liabilities and obligations under the lease accruing from and after the effective date of the assignment.

As a result of the assignments, the Organization has no further lease obligations as of June 30, 2015.

Note 7 - Accumulated Compensated Absences

Employees do not earn vacation and sick leave, but "Personal Time Off", which is fully vested. The liability is expected to be paid from future resources and therefore is only presented on the statement of net position. For the year ended June 30, 2015, the Organization paid out \$275,095 of accrued personal time off to employees. The remaining liability was transferred to Rogue Workforce Partnership.

	Accrued 6/30/2014	Earned	Taken	Transferred to RWP	Accrued 6/30/2015
Governmental Activities	<u>\$ 182,038</u>	<u>128,227</u>	<u>275,095</u>	<u>35,170</u>	<u>\$ -</u>

Note 8 - Pension Plan

The Oregon Public Employees Retirement System (PERS) consists of a single cost-sharing multiple-employer defined benefit plan.

Plan Benefits -

All benefits of the System are established by the legislature pursuant to Oregon Revised Statute (ORS) Chapter 238 and 238A.

Tier One/Tier Two Retirement Benefit (Chapter 238)

The ORS Chapter 238 Defined Benefit Plan was closed to new members hired on or after August 29, 2003.

Pension Benefits - The PERS retirement allowance is payable monthly for life. It may be selected from 13 retirement benefit options. These options include survivorship benefits and lump-sum refunds. The basic benefit is based on years of service and final average salary. A percentage (2.0 percent for police and fire employees, 1.67 percent for general service employees) is multiplied by the number of years of service and the final average salary. Benefits may also be calculated under a formula plus annuity (for members who were contributing before August 21, 1981) or a money match computation if a greater benefit results.

A member is considered vested and will be eligible at minimum retirement age for a service retirement allowance if he or she has had a contribution in each of five calendar years or has reached at least 50 years of age before ceasing employment with a participating employer (age 45 for police and fire members). General Service employees may retire after reaching age 55. Police and fire members are eligible after reaching age 50. Tier One general service employee benefits are reduced if retirement occurs prior to age 58 with fewer than 30 years of service. Police and fire member benefits are reduced if retirement occurs prior to age 55 with fewer than 25 years of service. Tier Two members are eligible for full benefits at age 60. The ORS Chapter 238 Defined Benefit Pension Plan was closed to new members hired on or after August 29, 2003.

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 8 - Pension Plan (continued)

Plan Benefits (continued)-

Death Benefits - Upon the death of a non-retired member, the beneficiary receives a lump-sum refund of the member's account balance (accumulated contributions and interest). In addition, the beneficiary will receive a lump-sum payment from employer funds equal to the account balance, provided one or more of the following conditions are met:

- Member was employed by a PERS employer at the time of death,
- Member died within 120 days after termination of PERS-covered employment,
- Member died as a result of injury sustained while employed in a PERS-covered job, or
- Member was on an official leave of absence from a PERS-covered job at the time of death.

Disability Benefits - A member with 10 or more years of creditable service who becomes disabled from other than duty-connected causes may receive a non-duty disability benefit. A disability resulting from a job-incurred injury or illness qualifies a member (including PERS judge members) for disability benefits regardless of the length of PERS-covered service. Upon qualifying for either a non-duty or duty disability, service time is computed to age 58 (55 for police and fire members) when determining the monthly benefit.

Benefit Changes After Retirement – Members may choose to continue participation in a variable equities investment account after retiring and may experience annual benefit fluctuations due to changes in the market value of equity investments.

Under ORS 238.360 monthly benefits are adjusted annually through cost-of-living changes. Under current law, the cap on the COLA in fiscal year 2015 and beyond will vary based on 1.25 percent on the first \$60,000 of annual benefit and 0.15 percent on annual benefits above \$60,000.

OPSRP Pension Program (Chapter 238A)

The ORS Chapter 238A Defined Benefit Pension Program provides benefits to members hired on or after August 29, 2003.

Pension Benefits - This portion of OPSRP provides a life pension funded by employer contributions. Benefits are calculated with the following formula for members who attain normal retirement age:

Police and Fire - 1.8 percent is multiplied by the number of years of service and the final average salary. Normal retirement age for police and fire members is age 60 or age 53 with 25 years of retirement credit. To be classified as a police and fire member, the individual must have been employed continuously as a police and fire member for at least five years immediately preceding retirement.

General Service - 1.5 percent is multiplied by the number of years of service and the final average salary. Normal retirement age for general service members is age 65, or age 58 with 30 years of retirement credit.

A member of the pension program becomes vested on the earliest of the following dates: the date the member completes 600 hours of service in each of five calendar years, the date the member reaches normal retirement age, and, if the pension program is terminated, the date on which termination becomes effective.

Death Benefits - Upon the death of a non-retired member, the spouse or other person who is constitutionally required to be treated in the same manner as the spouse receives for life 50 percent of the pension that would otherwise have been paid to the deceased member.

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 8 - Pension Plan (continued)

Plan Benefits (continued) -

Disability Benefits - A member who has accrued 10 or more years of retirement credits before the member becomes disabled or a member who becomes disabled due to job-related injury shall receive a disability benefit of 45 percent of the member's salary determined as of the last full month of employment before the disability occurred.

Benefit Changes After Retirement - Under ORS 238A.210, monthly benefits are adjusted annually through cost-of-living changes. Under current law, the cap on the COLA in fiscal year 2015 and beyond will vary based on 1.25 percent on the first \$60,000 of annual benefit and 0.15 percent on annual benefits above \$60,000.

Contributions -

PERS funding policy provides for monthly employer contributions at actuarially determined rates. These contributions, expressed as a percentage of covered payroll, are intended to accumulate sufficient assets to pay benefits when due. This funding policy applies to the PERS Defined Benefit Plan and the Other Postemployment Benefit Plans. Employer contribution rates during the period were based on the December 31, 2011 actuarial valuation, which became effective July, 2013. The State of Oregon and certain schools, community colleges, and political subdivisions have made unfunded actuarial liability payments, and their rates have been reduced. Employer contributions for the year ended June 30, 2015 were \$235,202 excluding amounts to fund employer specific liabilities.

A 10 year schedule of Defined Benefit Pension Plan Contributions can be found beginning on page 58 of the June 30, 2014 PERS CAFR.

Pension Plan Comprehensive Annual Financial Report (CAFR) -

Oregon PERS produces an independently audited CAFR which can be found at: http://www.oregon.gov/pers/Pages/section/financial_reports/financials.aspx.

Actuarial Valuation -

The employer contribution rates effective July 1, 2013, through June 30, 2015, were set using the entry age normal actuarial cost method. For the Tire One/Tier Two component of the PERS Defined Benefit Plan, this method produced an employer contribution rate consisting of (1) an amount for normal cost (the estimated amount necessary to finance benefits earned by employees during the current service year), (2) an amount for the amortization of unfunded actuarial accrued liabilities, which are being amortized over a fixed period with new unfunded actuarial accrued liabilities being amortized over 20 years.

For the OPSRP Pension Program component of the PERS Defined Benefit Plan, this method produced an employer contribution rate consisting of (a) an amount for normal cost (the estimated amount necessary to finance benefits earned by the employees during the current service year), (b) an amount for the amortization of unfunded actuarial accrued liabilities, which are being amortized over a fixed period with new unfunded actuarial accrued liabilities being amortized over 16 years.

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 8 - Pension Plan (continued)

Actuarial Methods and Assumptions Used in Developing Total Pension Liability -

Valuation Date:	December 31, 2012 rolled forward to June 30, 2014.
Actuarial Cost Method:	Entry age normal .
Experience Study Report:	2012, published September 18, 2013.
Amortization Method:	Amortized as a level percentage of payroll as layered amortization bases over a closed period; Tier One/Tier Two UAL is amortized over 20 years and OPSRP pension UAL is amortized over 16 years.
Asset Valuation Method:	Market value of assets.
Asset Valuation Method:	Market value of assets
Inflation Rate:	2.75%
Investment Rate of Return:	7.75%
Projected Salary Increases	3.75%
Mortality:	Health Retirees and Beneficiaries: RP-2000 sex-distinct, generational per scale AA, with collar adjustments and set-backs as described in the valuation. Active Members: Mortality rates are a percentage of healthy retiree rates that vary by group, as described in the valuation. Disabled Retirees: Mortality rates are a percentage (65% for males, 90% for females) of the RP-2000 static combined disabled mortality sex-distinct table.

Actuarial Methods and Assumptions Used in Developing Total Pension Liability (continued) -

Actuarial valuations of an ongoing plan involve estimates of the value of reported amounts and assumptions about the probability of events far into the future. Actuarially determined amounts are subject to continual revision as actual results are compared to past expectations and new estimates are made about the future. Experience studies are performed as of December 31 of even numbered years. The methods and assumptions shown above are based on the 2012 Experience Study which reviewed experience for the four-year period ending on December 31, 2012.

Discount Rate -

The discount rate used to measure the total pension liability was 7.75 percent for the Defined Pension Plan. The projection of cash flows used to determine the discount rate assumed that contributions from plan members and those of the contributing employers are made at the contractually required rates, as actuarially determined. Based on those assumptions, the pension plan's fiduciary net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments for the Defined Benefit Pension Plan was applied to all periods of projected benefit payments to determine the total pension liability.

Investment Rate of Return -

To develop an analytical basis for the selection of the long-term expected rate of return assumption, in July 2013 the PERS Board reviewed long-term assumptions developed by both Milliman's capital market assumptions team and the Oregon Investment Council's (OIC) investment advisors. The table below shows Milliman's assumptions for each of the asset classes in which the plan was invested at that time based on the OIC long-term target asset allocation. The OIC's description of each asset class was used to map the target allocation to the asset classes shown below. Each asset class assumption is based on a consistent set of underlying assumptions, and includes adjustment for the inflation assumption. These assumptions are not based on historical returns, but instead are based on a forward-looking capital market economic model.

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 8 - Pension Plan (continued)

Asset Class	Target %	Compound Annual Return
Core Fixed Income	7.20	4.50
Short-Term Bonds	8.00	3.70
Intermediate-Term Bonds	3.00	4.1
High Yield Bonds	1.80	6.66
Large Cap US Equities	11.65	7.2
Mid Cap US Equities	3.88	7.3
Small Cap US Equities	2.27	7.45
Developed Foreign Equities	14.21	6.9
Emerging Foreign Equities	5.49	7.4
Private Equity	20.00	8.26
Opportunity Funds/Absolute Return	5.00	6.01
Real Estate (Property)	13.75	6.51
Real Estate (REITS)	2.50	6.76
Commodities	7.71	6.07

Pension Liabilities/Assets, Pension Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions -

At June 30, 2015, the Organization reported an asset of \$581,950 for its proportionate share of the net pension asset. The net pension asset was measured as of June 30, 2014, and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of December 31, 2012. The Organization's proportion of the net pension asset was based on a projection of the Organization's long-term share of contributions to the pension plan relative to the projected contributions of all participating employers, actuarially determined. At June 30, 2014, the Organization's proportion was approximately 0.02567 percent.

For the year ended June 30, 2015, the Organization recognized pension income (offset to expense) of \$787,815. Pension income was generated during the measurement period primarily as a result of greater than anticipated investment returns at the OPERS level. At June 30, 2015, the Organization reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Net difference between projected and actual earnings on investments:	\$ -	\$ 1,122,927
Change in proportion and differences between employer contributions and proportionate share of contributions:	7,364	-
Organization's contributions subsequent to the measurement date:	235,202	-
Total	<u>\$ 242,566</u>	<u>\$ 1,122,927</u>

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 8 - Pension Plan (continued)

\$235,202 reported as deferred outflows of resources related to pensions resulting from Organization contributions subsequent to the measurement date will be recognized as an increase to the net pension asset in the year ended June 30, 2016. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense (income) as follows:

Year Ended June 30	Deferred Outflow/(Inflow) of Resources (prior to post- measurement date contributions)
2016	\$ (242,514)
2017	(242,514)
2018	(242,514)
2019	(242,514)
2020	(145,508)
Thereafter	-
Total	<u>\$ (1,115,564)</u>

Sensitivity for the Organization's Proportionate Share of the Net Pension Asset to Changes in Discount Rate-

The following presents the Organization's proportionate share of the net pension asset/(liability) calculated using the discount rate of 7.75 percent, as well as what the Organization's proportionate share of the net pension liability would be if it were calculated using a discount rate that is 1-percentage point lower (6.75 percent) or 1-percentage point higher (8.75 percent) than the current rate:

Organization's Net Pension Asset/(Liability)	1% Decrease (6.75)	Current Discount Rate (7.75%)	1% Increase (8.75%)
Defined Benefit Pension Plan	\$ (1,232,359)	\$ 581,950	\$ 2,116,429

Note 9 - Pension Related Debt

In 2001 the Organization became a member of PERS Local Government Rate Pool (LGRP). Pooling allows separate employers to be part of one group for the purpose of determining employer pension costs and contribution rates. Subsequent to the Organization joining LGRP, the Oregon legislature merged the LGRP with the State/Community College Pool, forming the State and Local Government Rate Pool (SLGRP). In 2004, the Organization elected to become a member of the SLGRP.

Upon joining the LGRP in 2001, a transition liability or surplus was calculated to ensure that each employer entered the pool on a comparable basis. The transition liability is maintained separately from the SLGRP, and is reduced by contributions and increased by interest charges at an assumed interest rate, originally 8%, which was reduced to 7.75% in 2013 and to 7.5% in 2015. PERS establishes the contribution rates, currently 20.78%, based on covered payroll.

The transition liability is being amortized through December 2027. The Organization can elect to pay the transition liability at any time.

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 9 - Pension Related Debt (continued)

The Organization has estimated the payment activity from June 30, 2014 to June 30, 2015 as follows:

Principal Balance June 30, 2014	Principal	Principal Balance June 30, 2015	Interest Component Paid During Fiscal 2015
\$ 4,736,782	(136,543)	\$ 4,600,239	\$ 236,543

The principal balance due as of June 30, 2014 was obtained from a third party actuary as of December 31, 2014. The June 30, 2015 balance was estimated by PERS using the December 31, 2014 actuary balance and activity from January 1, 2015 through June 30, 2015.

Annual debt service to maturity is based on the assumed interest rate, currently 7.5% and the rate charged by PERS, which will be 20.78% of covered payroll for the years ending June 30, 2016 and 2017.

For the year ended June 30, 2015, the Organization recognized \$236,543 of pension expense on the Statement of Activities for amortization of this debt.

Note 10 - Contingencies

Amounts received or receivable from grantor agencies are subject to compliance audits by grantors or their representatives. The amount, if any, of expenditures which may be disallowed by the granting agencies cannot be determined at this time although the Organization expects such amounts, if any, to be immaterial.

Substantially all the Organization's revenues for continuing operations are from grants from federal, state, and local government agencies. The grant programs are subject to audit by agents of the granting authority, the purpose of which is to ensure compliance with conditions precedent to the granting of funds. Any liability for reimbursement which may arise as the result of these audits is not believed to be material.

Note 11 - Risk Management

The Organization is exposed to various risks of loss related to torts; theft of, damage to and destruction of assets; errors and omissions; and natural disasters for which the Organization carries commercial insurance. Worker's compensation insurance is also provided through a commercial carrier. There has been no significant reduction in insurance coverage from the prior year and the Organization has not been required to pay any settlements in excess of insurance coverage during the past three fiscal years ending June 30, 2015.

Note 12 - Related Parties

The Organization has entered into contracts with organizations whose management includes members of the RWP. The following such contracts were in effect during the year ended June 30, 2015:

Agency	Funding Title	Contract Amount
Adult & Family Services/Department of Human Services	JOBS	\$ 1,364,615
Adult & Family Services/Department of Human Services	OFSET	247,377
Southern Oregon Goodwill Industries	OFSET	41,225
Rogue Community College	PATH	84,000
Rogue Community College	PATH (NCRC)	4,885
Jackson County Commission on Children and Families	WIA Youth	11,667
AFS/DHS	FS&C	190,575

THE JOB COUNCIL
Notes to the Basic Financial Statements
June 30, 2015

Note 12 - Related Parties (continued)

Receivables from and payables to related parties arise from the provision of contracted services, and are paid to or by the Organization in the normal course of business upon submission of expenditure reports.

At June 30, 2015, receivables from related parties consisted of:

<u>Agency</u>	<u>Funding Title</u>	<u>Amount</u>
Adult & Family Services/Department of Human Services	JOBS	\$ 527,364
Adult & Family Services/Department of Human Services	OFFSET	67,626
Adult & Family Services/Department of Human Services	FS&C	51,468
Rogue Community College	PATH	36,901
AFS/DHS	Child Care	30,411

Note 13 - Subsequent Events

Management of the Organization has evaluated events and transactions occurring after June 30, 2015 through March 16, 2016, the date of the financial statements were available for issuance, for recognition and/or disclosure in the financial statements.

On April 30, 2015, the Oregon Supreme Court ruled in the Moro decision, that the provisions of Senate Bill 861, signed into law in October 2013, that limited the post-retirement COLA on PERS benefits accrued prior to the signing of the law, were unconstitutional. Benefits could be modified prospectively, but not retrospectively. As a result, those who retired before the bills were passed with continue to receive a COLA tied to the consumer Price Index that normally results in a 2% increase annually. PERS will make restoration payments to those benefit recipients.

PERS members who have accrued benefits before and after the effective dates of the 2013 legislation will have a blended COLA rate when they retire.

This is a change in benefit terms subsequent to the measurement date of June 30, 2014, which will be reflected in the next year's actuarial valuations. The impact of the Moro decision on the total pension liability and employer's net pension asset/(liability) is estimated to reverse the asset to a liability of \$1,586,000.

Note 14 - Going Concern

As a result of the terminated intergovernmental entity agreement, the Organization ceased operations effective June 30, 2015. Uncertainty exists with the net settlement of obligations associated with pensions. On June 25, 2015, Management notified PERS of its pending liquidation. The Organization stopped funding PERS obligations effective June 30, 2015 as it no longer had covered payroll.

REQUIRED SUPPLEMENTARY INFORMATION

**THE JOB COUNCIL
SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES
IN FUND BALANCE - BUDGET AND ACTUAL
GENERAL FUND
YEAR ENDED JUNE 30, 2015**

	Budget			Variance with Final Budget Positive (Negative)
	Adopted	Final	Actual	
REVENUES				
WIA	\$ 3,505,625	\$ 3,505,625	\$ 2,935,059	\$ (570,566)
TANF/JOBS/OFFSET	1,856,315	1,856,315	1,759,115	(97,200)
Child Care	452,940	452,940	470,721	17,781
Other	1,023,613	1,023,613	1,160,544	136,931
TOTAL REVENUES	6,838,493	6,838,493	6,325,439	(513,054)
EXPENDITURES				
Personal Services	3,719,938	3,719,938	3,877,287	(157,349)
Material and Services	788,178	788,178	912,154	(123,976)
Travel and Training	17,738	17,738	29,256	(11,518)
RWP Programs and Support	19,000	19,000	-	19,000
Client Services	1,833,615	1,833,615	1,497,870	335,745
Contingency	460,024	460,024	-	460,024
TOTAL EXPENDITURES	6,838,493	6,838,493	6,316,567	521,926
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	-	-	8,872	8,872
NET CHANGE IN FUND BALANCE	-	-	8,872	8,872
FUND BALANCE, July 1, 2014	-	-	673,826	673,826
FUND BALANCE, June 30, 2015	\$ -	\$ -	\$ 682,698	\$ 682,698

THE JOB COUNCIL

**SCHEDULE OF THE ORGANIZATION'S PROPORTIONATE SHARE OF THE NET PENSION ASSET/(LIABILITY)
AND SCHEDULE OF THE ORGANIZATION'S CONTRIBUTIONS
OREGON PUBLIC EMPLOYEES RETIREMENT SYSTEM (OPERS)
LAST 10 FISCAL YEARS ENDING JUNE 30 (For Years Information is Available)**

The Job Council Proportionate Share of Net Pension Asset/(Liability)

	<u>2014</u>	<u>2013</u>
Organization's proportion of the net pension asset/(liability)	0.02567370%	0.02567370%
Organization's proportion of the net pension asset/(liability)	\$ 581,950	\$ (1,310,167)
Organization's covered-employee payroll	\$ 1,887,852	\$ 1,813,019
Organization's proportionate share of the net pension asset/(liability) as a percentage of its covered-employee payroll	30.83%	72.26%
Plan fiduciary net position as a percentage of the total pension liability	103.59%	91.97%

The Job Council Contributions

	<u>2015</u>	<u>2014</u>
Contractually required contributions	\$ 235,202	\$ 237,024
Contribution in relation to the contractually required	<u>(235,202)</u>	<u>(237,024)</u>
Contributions deficiency (excess)	<u>\$ -</u>	<u>\$ -</u>
Organization's covered - employee payroll	\$ 1,938,175	\$ 1,887,852
Contributions as a percentage of covered-employee payroll	12.14%	12.56%

Note 1 - Changes of Benefit Terms and Assumptions -

No such changes have occurred since the actuarial valuation date of December 31, 2012.

AUDIT COMMENTS AND DISCLOSURES
REQUIRED BY STATE REGULATIONS

**INDEPENDENT AUDITOR'S REPORT
REQUIRED BY OREGON STATE REGULATIONS**

To the Board of Directors
The Job Council
Medford, Oregon

We have audited the basic financial statements of The Job Council as of and for the year ended June 30, 2015, and have issued our report thereon dated March 16, 2016. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller of the United States.

Compliance

As part of obtaining reasonable assurance about whether the Organization's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not the objective of our audit, and accordingly, we do not express such an opinion.

We performed procedures to the extent we considered necessary to address the required comments and disclosures but were not limited to the following:

- Deposit of public funds with financial institutions under ORS Chapter 295.
- Indebtedness limitations, restrictions and repayment.
- Budgets legally required under ORS Chapter 294.900 to 294.930.
- Insurance and fidelity under bonds in force or required by law.
- Programs funded from outside sources.
- Authorized investment of surplus funds (ORS Chapter 294).
- Public contracts and purchasing under ORS Chapters 279A, 279B, 279C.

In connection with our audit, nothing came to our attention that caused us to believe the Organization was not in substantial compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administration Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations.

Board of Directors
The Job Council
Medford, Oregon

OAR 162-10-0230 Internal Control

In planning and performing our audit, we considered The Job Council's internal control over financial reporting as a basis for designing our auditing procedures for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of The Job Council's internal control over financial reporting. Accordingly, we do not express an opinion on the effectiveness of The Job Council's internal control over financial reporting.

This report is intended solely for the information and use of The Job Council's Board, Management of The Job Council and the State of Oregon, Division of Audits and is not intended to be and should not be used by anyone other than these parties.

A handwritten signature in black ink, appearing to read "Mark E. Damon", with a long horizontal flourish extending to the right.

Mark E. Damon, CPA, Partner
KDP Certified Public Accountants, LLP
Medford, Oregon
March 16, 2016

ITEMS REQUIRED BY THE SINGLE AUDIT ACT
AMENDMENTS OF 1996 FOR FEDERAL AWARD PROGRAMS

**INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING
AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL
STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS**

To the Board of Directors
The Job Council
Medford, Oregon

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities, the major fund, and the aggregate remaining fund information of The Job Council, as of and for the year ended June 30, 2015, and the related notes to the financial statements, which collectively comprise The Job Council's basic financial statements, and have issued our report thereon dated March 16, 2016.

Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered The Job Council's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of The Job Council's internal control. Accordingly, we do not express an opinion on the effectiveness of The Job Council's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or, significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control over financial reporting that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether The Job Council's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

A handwritten signature in black ink, appearing to read "Mark E. Damon", with a long horizontal flourish extending to the right.

Mark E. Damon, CPA, Partner
KDP Certified Public Accountants, LLP
Medford, Oregon
March 16, 2016

**INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH
MAJOR PROGRAM AND ON INTERNAL CONTROL OVER COMPLIANCE
REQUIRED BY OMB CIRCULAR A-133**

To the Board of Directors
The Job Council
Medford, Oregon

Report on Compliance for Each Major Federal Program

We have audited The Job Council's compliance with the types of compliance requirements described in the *OMB Circular A-133 Compliance Supplement* that could have a direct and material effect on each of The Job Council's major federal programs for the year ended June 30, 2015. The Job Council's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

Management's Responsibility

Management is responsible for compliance with the requirements of laws, regulations, contracts, and grants applicable to its federal programs.

Auditor's Responsibility

Our responsibility is to express an opinion on compliance for each of The Job Council's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and OMB Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*. Those standards and OMB Circular A-133 require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about The Job Council's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of The Job Council's compliance.

Opinion on Each Major Federal Program

In our opinion, The Job Council complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2015.

Report on Internal Control over Compliance

Management of The Job Council is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered The Job Council's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with OMB Circular A-133, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of The Job Council's internal control over compliance.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of OMB Circular A-133. Accordingly, this report is not suitable for any other purpose.



Mark E. Damon, CPA, Partner
KDP Certified Public Accountants, LLP
Medford, Oregon
March 16, 2016

**THE JOB COUNCIL
SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
YEAR ENDED JUNE 30, 2015**

Federal Grantor/Pass-through Grantor/Program Title	CFDA Number	Pass-through Grantor's Number	Expenditures
U.S. Department of Labor:			
Passed through the State of Oregon:			
Department of Community Colleges and Workforce Development:			
Workforce Investment Act:			
Title IB WIA Adult	17.258	J01007	\$ 918,507
Title IB WIA Dislocated Worker	17.278	J01007	798,153
Title IB WIA Youth	17.259	J01007	628,208
Title IB WIA Local Administration	17.278	J01007	266,055
Rapid Response	17.278	J01007	29,721
Local Board Support (RWP)	17.278	J01007	<u>294,415</u>
Total Workforce Investment Act Cluster			<u>2,935,059</u>
National Emergency Grants (NEG)	17.277	J01007	<u>178,927</u>
Total U.S. Department of Labor			<u>3,113,986</u>
U.S. Department of Health and Human Services:			
Passed through the State of Oregon Department of Human Services			
Passed through the Child Care and Refugee Programs			
Resource and Referral	93.575		109,009
Passed through the State of Oregon Department of Education			
Passed through the Early Learning Division, Child Care Office			
Resource and Referral	93.575		<u>255,342</u>
Total Child Care and Development Block Grant			<u>364,351</u>
Passed through Jackson County Health and Human Services:			
Commission on Children and Families	93.667		<u>11,667</u>
Total U.S. Department of Health and Human Services			<u>376,018</u>
U.S. Department of Education:			
Passed through the Early Learning Division, Child Care Office			
Quality Rating and Improvement System (QRIS)	84.412A		<u>72,541</u>
U.S. Department of Interior - Bureau of Land Management:			
Passed through Youth Education Forestry Stewardship, Medford District, Oregon	15.234		<u>72,595</u>
Passed through the State of Oregon acting through the Oregon			
Department of Community Colleges and Workforce Development			
Recreation Resource Management Funds, Medford District, Oregon	15.225		<u>39,700</u>
Total U.S. Department of Interior			<u>112,295</u>
Total Federal Awards			<u>\$ 3,674,840</u>

**THE JOB COUNCIL
NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
YEAR ENDED JUNE 30, 2015**

1. Organization of Schedule

All federal awards expended by The Job Council are included in the schedule.

Grants are organized by federal department or agency and identified by the 2015 Catalog of Federal Domestic Assistance (CFDA) number.

2. Basis of Presentation

The accompanying schedule of expenditures of federal awards includes the federal grant activity of The Job Council, and is presented on the modified accrual basis of accounting. The information in this schedule is presented in accordance with the requirements of OMB Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*. Therefore, some amounts presented in this schedule may differ from amounts presented in, or used in the preparation of, the basic financial statements.

**THE JOB COUNCIL
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
YEAR ENDED JUNE 30, 2015**

A. SUMMARY OF AUDIT RESULTS

1. The independent auditor's report expresses unmodified opinion on the financial statements.
2. No significant deficiencies or material weaknesses in internal controls were disclosed by the audit of the Financial Statements.
3. No instances of noncompliance material to the financial statements were disclosed during the audit.
4. No significant deficiencies or material weaknesses in internal control over major programs were disclosed by the audit.
5. The auditor's report on compliance for the major federal award programs expresses an unmodified opinion on all major federal programs.
6. The audit disclosed no findings that are required to be reported in accordance with section 510(a) of OMB Circular A-133.
7. The programs tested as major programs include:
 - CFDA Numbers 17.258, 17.259, and 17.278 - Workforce Investment Act (WIA) cluster
 - CFDA Number 93.575 – Child Care and Development Block Grant
8. The dollar threshold used to distinguish between Type A and Type B programs was \$300,000.
9. The Job Council did not qualify as a low-risk auditee.

B. FINDINGS - FINANCIAL STATEMENTS AUDIT

None

C. FINDINGS AND QUESTIONED COSTS - MAJOR FEDERAL AWARD PROGRAMS AUDIT

None

**THE JOB COUNCIL
SCHEDULE OF PRIOR AUDIT FINDINGS
YEAR ENDED JUNE 30, 2015**

U.S. DEPARTMENT OF LABOR AND U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES

FINDING 2014-1:

Condition: The Job Council did not prepare a cost allocation plan in accordance with the requirements described OMB Circular A-87. During the beginning of fiscal 2014, The Job Council was utilizing a cost allocation plan developed during prior years and was estimating indirect costs when submitting for federal reimbursement. More specifically, The Job Council accounted for its indirect costs monthly but did not allocate the actual indirect cost to each of its programs on a monthly basis and as a result, reimbursement requests included estimates of indirect costs. In addition, certain federal fund reimbursement requests were made without formal backup and insufficient documentation or approval.

Recommendation: The auditor recommended establishing a cost allocation plan at the beginning of the fiscal year as required by OMB Circular A-87 and to ensure all requests for reimbursements include actual indirect costs utilizing the established cost allocation plan. In addition, the auditor recommended a robust approval and coding process at the onset of payment for goods and services. This documentation was to serve as the formal documentation utilized to support all requests for federal reimbursement. Finally, the auditor recommended all requests for reimbursement include a packet to support the request for reimbursement, the cost be actual cost incurred, and the packet contain evidence of review and approval.

Current Status: The Job Council established a cost allocation plan along with an approval and coding process. No similar findings were noted in the 2015 audit.



ACTION BRIEF

TO: ROGUE WORKFORCE PARTNERSHIP

FROM: SHERRI EMITTE, DIRECTOR OF ADMINISTRATION

DATE: APRIL 1, 2016

SUBJECT: MID-YEAR BUDGET ADJUSTMENT

Last June the Board of Directors approved the PY15 Operating Budget for \$4,255,231. As is the case every year, we constructed this budget based upon estimates that we had received, and based upon our best efforts to determine the effect of splitting out Board activity from that of the service provider. We also had heard of some potential funding opportunities that might be coming our way, but did not have enough certainty last June to include those in the budget. With nine months having passed in this program year, we are proposing adjustments to the budget that more closely reflect this year's activity. We're happy to show the net addition of over \$1.2 million dollars in additional funding opportunities, as well as a decrease in expected operating expenditures. Following are the details of the proposed changes.

REVENUES:

WIOA Funds

- In Adult, Dislocated Worker, and Youth, we did have some unused rollover funds from The Job Council, as well as some new funding from the State.
- In National Emergency Grant Dislocated Worker Training, the \$5891 represents some unused rollover funds from TJC.
- The Rapid Response grant has just been approved for the shut-down of Rough and Ready in Cave Junction. There will be additional funding available in the next fiscal year as well.

DHS Funds

- The contract with JOBS and OFSET is only for facilities and equipment overhead for their separate contracts with ResCare. This budget decrease was due to some operating expense budget reductions which will be more detailed below in the Expenditures section.

Other Income

- We have received several new funding sources since last June. We were aware of some of the potential sources last year, but did not have confirmation as of budget approval. Others are completely new opportunities.
- Following are the highlights of new funding sources:

- Back to Work Oregon – This is a continuation of the program we have had for the past four years, connecting businesses and clients with On-The-Job Training opportunities. The amount shown represents the first year of a \$415,636 two-year contract.
- Rethinking Job Search – This is a subcontract from Incite Inc. (the Workforce Board in Salem) for funds that they received from the Department of Labor. The amount shown represents the first (partial) year of a \$154,664 three-year contract, which will facilitate small group workshops designed to increase job placement and retention among those currently receiving UI benefits, using cognitive behavior strategies.
- SOHOPE (Southern Oregon Health Occupations Poverty Elimination Program) – This is a subcontract from Rogue Community College for funds that they received through the Health Profession Opportunity Grant (HPOG) from the U.S. Department of Health and Human Services. The amount shown represents the first (partial) year of a 10-month \$178,653 contract which will be used to provide eligible individuals with the opportunity to obtain education and training in the healthcare field.
- RCC PATH – This is not a new funding source, but represents an amount rolled over from The Job Council to finish out the contract.
- REACH (Rogue Educational Achievement Grant) – This is a TANF/ERDC Education Pilot Project from the Oregon Department of Human Services in which we will work with our community partners to develop a program to provide targeted community college career pathway opportunities to TANF and ERDC clients. The amount shown represents the first (partial) year of an 18-month \$500,000 contract.
- Rogue River Watershed Council – This is a \$5,200 tree-planting contract to be performed by our Service Provider's youth crew.
- Sector Strategies – This is a continuation of the funding we've had for the past two years with which we will implement local, industry-driven partnership. The amount shown represents the first year of a \$152,708 contract from the State.
- Careers in Gear – This \$8,300 represents sponsorship funding and booth fees for the event that just happened in March.
- Endowment Fund Contribution – We have taken the liberty in this budget document of assuming the Board's approval of two contributions: \$3,264 toward our College Dreams youth contract in their increased NCRC testing in local high schools; and \$6,496 toward Careers in Gear expenditures. Of the amount going to Careers in Gear, \$3,316 represents a prior year invoice that we weren't previously aware of. The remaining \$3,180 is needed to offset our contract with Junior Achievement in their coordination of this year's event. The approval of this budget adjustment will be subject to your approval of the Endowment Fund contribution.
- Fee for Service – This \$3,900 represents amounts collected for a training we coordinated earlier in the year.
- Donations / In Kind – This \$56,790 represents a donation of \$21,120 from Tech Soup on our Windows software upgrade (it actually cost us only \$1,024); and a facilities donation valued at \$34,670 for the aforementioned training session. Both of these amounts have been offset by corresponding expenditures; but under non-profit accounting standards, we are required to present them in this way.

- Other revenue changes include the elimination of PowerUp income (we decided it wasn't the right time to ramp that up yet); reducing Local Board Support from the full amount of the contract to just what would be used in this fiscal year; and the revised presentation of rental income (we haven't actually lost any significant revenue).

EXPENDITURES:

PERSONNEL

- The \$13,004 net decrease came about by the addition of business services personnel, offset by over \$45,000 in reimbursements from The Job Council for administrative help in closing down its operations.

CONTRACTED SERVICES

- The largest impact to the decrease of \$104,182 was the decrease of over \$320,000 for the implementation of the Job Driven National Emergency Grant, which was reclassified into the contract to the One Stop Service Provider. Added to this line item was over \$139,000 to Employment Department for service provision for the Rapid Response funding, as well as the \$34,670 offset for the donated training facility donation.

RWP AND ONE STOP OPERATING EXPENSES

- There were some expenditures that didn't happen this year that needed to be decreased in the budget, with the notable amounts being \$27,000 in audit fees (the audit was paid for by TJC funds); \$50,000 in capital expenditures; and a \$30,000 contingency.

CONTRACT TO ONE STOP PROVIDER

- The acquisition of all of the new funding sources noted above resulted in a much larger contract for ResCare than the one originally executed.

ROLLOVER INTO FOLLOWING YEAR

- This amount consists mostly of WIOA program and administrative funds, the excess of which will be able to be used in the subsequent fiscal year.

RECOMMENDATION:

It is recommended that the Board of Directors approve the Mid-Year Budget Adjustments as presented.

ROGUE WORKFORCE PARTNERSHIP**BUDGET ADJUSTMENT FOR YEAR ENDING JUNE 30, 2016**

REVENUES	APPROVED JUNE 2015	PROPOSED ADJUSTMENTS	PROPOSED AMENDED
WORKFORCE INNOVATION & OPPORTUNITY ACT			
Title 1B Adult	797,884	62,803	860,687
Title 1B Dislocated Worker	1,203,473	260,847	1,464,320
Title 1B Youth	1,138,838	196,603	1,335,441
National Emergency Grant Dislocated Worker Training	0	5,981	5,981
Job-Driven National Emergency Grant	362,250	0	362,250
Rapid Response	0	148,012	148,012
WIOA SUBTOTAL	3,502,445	674,246	4,176,691
DHS			
JOBS	182,641	(18,219)	164,422
OFFSET	25,966	(1,115)	24,851
DHS SUBTOTAL	208,607	(19,334)	189,273
OTHER INCOME			
National Fish & Wildlife Foundation	74,480	0	74,480
PowerUp	30,000	(30,000)	0
SORS	72,000	(2,264)	69,736
Local Board Support	170,000	(83,281)	86,719
SOESD (CCRN)	40,999	(40,999)	0
Rental Income / Cost Reimbursements	156,696	(288)	156,408
Back to Work Oregon	0	233,100	233,100
Rethinking Job Search	0	38,666	38,666
SOHOPE	0	59,551	59,551
RCC PATH	0	9,838	9,838
REACH	0	166,667	166,667
Rogue Watershed	0	5,200	5,200
Sector Strategies	0	125,700	125,700
Careers in Gear	0	8,300	8,300
Endowment Fund Contribution	0	9,760	9,760
Fee for Service (Sector Training)	0	3,900	3,900
Donations / In Kind	0	56,790	56,790
OTHER INCOME SUBTOTAL	544,175	560,640	1,104,815
TOTAL REVENUES	4,255,227	1,215,552	5,470,779
EXPENDITURES	APPROVED JUNE 2015	PROPOSED ADJUSTMENTS	PROPOSED AMENDED
SERVICES			
Personnel	704,914	(13,004)	691,910
Contracted Services	697,408	(100,918)	596,490
RWP Operating Expense	289,052	(25,518)	263,534
One Stop Operating Expense	522,442	(53,901)	468,541
Contract to One Stop Service Provider	2,041,415	1,066,043	3,107,458
Rollover into following year	0	342,846	342,846
TOTAL EXPENDITURES	4,255,231	1,215,548	5,470,779



ACTION BRIEF

To: RWP Corporate Directors
From: Jim Fong, Executive Director
Date: April 1, 2016
Subject: Rogue Workforce Partnership Local Plan - Final Review & Approval

Background / Discussion

The **Workforce Innovation & Opportunity Act Local Plan – Rogue Valley for 2016-2020** has been posted for the required 30-day review and public comment period.

In order to meet the State of Oregon's Local Plan submission deadline of April 1st, the RWP – Corporate Directors, functioning as the Executive Committee of the RWP Workforce Board, must take action to review and approve the final modifications to the plan, based on the input and feedback from RWP members, as well as other key stakeholders and community partners.

In addition, Josephine County Commissioner Cheryl Walker, acting in her capacity as designated Chief Elected Official, and in consultation with Jackson County Commissioner Rick Dyer, has reviewed and approved the Local Plan, and signed the necessary Statement of Concurrence document required as part of this Local Plan submission (also requires RWP-Chair signature).

Input received from RWP members at our March 9th Workforce Board meeting, and feedback received via email are listed below for your review. All of these feedback points have been incorporated into the attached final draft version of the Local Plan. These are highlighted in red. Both RCC and AFL-CIO staff were further consulted by phone and email to ensure the modifications made to the plan fully address their proposed edits/points of view.

Feedback Summary

1. Discussion by RWP Members

- Email from Ron Fox: *Where are the measureable achievements or metrics? How will we know if we are moving forward toward our stated goals over a defined period of time, one quarter, one year or five years?*

RWP-Workforce Board Discussion:

We need great aspirations. We need 1-year and 2-year goals so we can communicate with the business community. Add goals that are measureable, for example:

- To address work ethic issues
- Changes in student skill attainment, graduation rate
- Changes in curriculum
- Doubling the CTE enrollment at RCC or the OIT enrollment of Southern Oregon students

These could be added as part of our sector strategies work group efforts. Do it at this level, instead of making it a part of this plan document

- Address Top, Middle & Entry level needs
- Add Work Expectations to Goal #4
(Keep in mind: young people are not the problem. Society is the problem.)
- Talk about the quality of life amenities of the Rogue Valley that make it a desirable place to live, locate, relocate or start a business. We need to support the Tourism/Hospitality industry as well as part of a comprehensive strategy to keep our region an attractive place to do business.

2. From Rogue Community College

In Section 1.4, page 10, discussion of training options, it is suggested the inclusion of language pertaining to Pathways (as is in the state plan) and the specific addition of:

1. *Industry-recognized credentials*
2. *Credit certificates, including Pathways certificates*
3. *Non-credit training and certificates*

This also aligns with Sector Strategies on page 20 where it mentions CTE/Perkins and career pathways.

Under Goal 3, third bullet, build foundational work skills; add:

1. *Continue to refer appropriate participants to Rogue Community College for Basic Skills remediation and GED test preparation.*

Under Attachment 6, page 36, Enhanced Partnerships and Systems Integration; add:

1. *Information from page 20 of the local plan about the intent of the Title II Task Force. Perhaps something like, "work with Title II and other partners to continuously improve and innovate to develop a highly streamlined, effective, efficient and integrated system for improving adult basic skills and GED completion."*

Additional feedback from RCC was incorporated through joint editing of the Local Plan document, and has been fully incorporated.

2. From AFL-CIO, Mark Warne

In Section 4.10 Describe how Rapid Response activities are coordinated and carried out in the local area. See Local Plan:

References and Resources [WIOA 108(b)(8)]

A company who may be closing or laying off workers and/or the labor union who represents the affected workers will contact the local service provider in the area. The service provider will then notify the Rapid Response Team and the team will work with the employer to schedule a meeting with the employees to assess the situation and provide options. Once the assessment is complete, a request for Rapid Response Funds, as well as a complete budget, will be submitted to RWP for approval. Upon approval, RWP will determine any cost that it may incur and will include it in the budget. Once that process is complete, the revised budget with the narrative will be sent to the state for final approval and payment will be made by the state. Rapid Response Team members should include:

- *Service Provider Dislocated Worker Liaison*
- *Oregon Employment Department representatives, including veteran representation*

- *State Labor Liaison*
- *Local Community College Representation*

Instead of incorporating the specific passage above, we worked with Mark Warne to create new verbiage to insert into our existing description of our region's Rapid Response process. His request has been fully incorporated into the Local Plan

Recommended Action

That the RWP-Corporate Directors review and approve the Final Draft version of the WIOA Local Plan for the Rogue Valley 2016-2020 for submission to the State of Oregon.

Workforce Innovation and Opportunity Act
Local Plan
ROGUE VALLEY

Submitted by



ROGUE WORKFORCE
PARTNERSHIP

July 1, 2016 – June 30, 2020

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DRAFT

Section 1: Workforce and Economic Analysis

Please answer the following questions in 10 pages or less. The Oregon Employment Department's Workforce and Economic Research Division has a regional economist and workforce analyst stationed in each of the nine local areas. These experts can assist in developing responses to the questions 1.1 through 1.3 below.

1.1 An analysis of the economic conditions including existing and emerging in-demand industry sectors and occupations; and the employment needs of employers in those industry sectors and occupations. [WIOA Sec. 108(b)(1)(A)]

Our analysis of economic conditions includes the following:

- Attachment 1 - A comprehensive description of current economic and labor market conditions, developed by the Oregon Employment Department – Workforce and Economic Research Division.
- Attachment 2 - List of a proposed top 20 ranking of high-wage, high-demand occupations for the Rogue Valley. A majority of these occupations fall within the Healthcare and Advanced Manufacturing sectors.
- Attachment 3 - A recent on-line article from OED "[Spotlight on Rogue Valley Manufacturing: Recovery from Great Recession](#)¹," that highlights the labor market trends in this important traded sector.
- Attachment 4 - A SOREDI announcement highlighting their recent business conference with a link to the [Milken Institute's Best Performing Cities Study 2015](#)² that has Southern Oregon ranking in the top twenty among more than 179 metro areas in the United States for the growth of our high-tech sector business.

Consistent with our past methodology, we combine these analyses and projections with strategic guidance and consultation from our regional economic development partner (SOREDI - Southern Oregon Regional Economic Development, Inc.) to target the key Sector Strategy industries for our region. This latest analysis affirms previous long-term trends in our region for high-demand industry sector occupations and the employment needs of the traded sector industries critical to our economic vitality. Our conclusion: to continue our focus on the three high-wage, high-demand Sector Strategy industries of Advanced Manufacturing, Information Technology / E-Commerce and Healthcare.

1.2 An analysis of the knowledge and skills required to meet the employment needs of the employers in the local area, including employment requirements for in-demand industry sectors and occupations. [WIOA Sec. 108(b)(1)(B)]

Roughly half (49%) of the total job openings from 2012-2022 in the Rogue Valley will require a high school diploma in order to have a competitive level of education. Statewide, 45 percent of the occupational job openings will need a high school diploma. Roughly one-in-five (21%) job openings will take postsecondary training (non-degree) to be competitive; that is the case in both the Rogue Valley and in Oregon. About 13% of the occupational job openings in the Rogue Valley will require a bachelor's degree or higher in order to be competitive; lower than the statewide average of 27 percent.

Occupational Openings by Competitive-Level Educational Need Rogue Valley, 2012-2022

Education	Total Openings
Total All Occupations	36,910
High school diploma or equivalent	18,031
Postsecondary training (non-degree)	7,673
Bachelor's degree	4,914
Associate's degree	3,134
Master's degree	2,129
Doctoral or professional degree	927
Not Classified	102

¹ See: https://www.qualityinfo.org/web/guest/-/spotlight-on-rogue-valley-manufacturing-recovery-from-great-recession?utm_campaign=January2016&utm_medium=email&utm_source=newsletter&utm_content=Josephine%20County

² <http://www.milkeninstitute.org/publications/view/758>

Of the roughly 3,000 job skills identified by the Oregon Employment Department, more than 2,600 are used for occupations in the Rogue Valley. Some of the more common skills, such as using basic mathematics, require formal education; but others are more connected to attitude, personality, and learning on the job. Being able to work as a team member, providing customer service and following safety procedures are also top skills.

Within the Rogue Valley's healthcare sector, a high school diploma is the competitive education level for only 1 percent of the total job openings from 2012 to 2022. Nearly half (46%) of the occupational job openings in healthcare will require non-degree postsecondary training in order to have a competitive level of education. Fewer openings (29%) in healthcare will require a bachelor's degree or higher in order to be competitive. Of the 45 percent of openings requiring a bachelor's degree or higher, about 10 percent require a Bachelor's degree to be competitive, 17 percent require a Master's degree, and the remainder requires a Doctoral or professional degree.

In the Rogue Valley's manufacturing sector, just over two-thirds (68%) of the job openings from 2012 to 2022 will require only a high school diploma to be competitive, a higher share than is found across the area's workforce as a whole. About one in four (27%) of the sector's job openings will require non-degree postsecondary training in order to have a competitive level of education, a slightly higher share to what is found looking across all industries (21%). Only 7 percent of the openings in manufacturing will require a bachelor's degree or higher to be competitive, a lower share than the 13 percent seen across all industries.

However, focusing on the highest ranked occupations on the OP4T (Occupational Prioritization for Training) list in manufacturing paints a picture that looks slightly different. The top 20 occupations have a total of roughly 1,250 openings projected from 2012 to 2022. More than one in five (22%) of those openings require non-degree postsecondary training to have a competitive level of education. About 10 percent of the openings require a bachelor's degree or higher. A high school diploma is a competitive level of education for 51 percent of the openings when looking at occupations within manufacturing with the highest occupational prioritization for training.

In looking at the 20 occupations across all industries with the highest training priority in the Rogue Valley, there will be over 2,300 occupational openings from 2012 to 2022. Nearly one in three (28%) of those openings will require non-degree postsecondary training in order to have a competitive level of education. Five percent of the high priority occupations will require a high school degree to be competitive. Another 6 percent will require an associate's degree. The remaining 61 percent of job openings from the top-20 high priority occupational training

Top 35 Skills Required In Occupations in Rogue Valley	
Skill	Total Openings 2012-2022
use basic mathematics	21875
process records and maintain forms and files	21593
work as a team member	18930
provide customer service	16787
follow safety procedures	13545
obtain information from clients, customers, patients or others	12409
use computers to enter, access and retrieve data	11797
apply health and sanitation standards	11517
maneuver heavy objects	10130
receive payments and make change	8627
prepare reports in timely manner	8198
use correct grammar, punctuation and spelling	7980
use cash registers	7501
provide customer service using telephone	7048
use algebra	6828
apply mathematical principles to accounting, bookkeeping or budgeting	6399
investigate and resolve customer problems	6367
understand, use, and communicate technical information	5895
process and prepare business forms	5642
use inventory control procedures	5555
apply food handling rules	5470
operate fax machines, copiers, printers, and other office machines	5399
interpret and apply health regulations in lodging and food service	5354
apply active listening techniques	5134
organize and work with detailed records	4981
resolve conflicts	4938
manage inventories and supplies	4721
apply quality assurance techniques	4720
make presentations	4568
use medical terminology	4539
stock, organize and clean shelves	4523
locate and retrieve merchandise from storage	4362

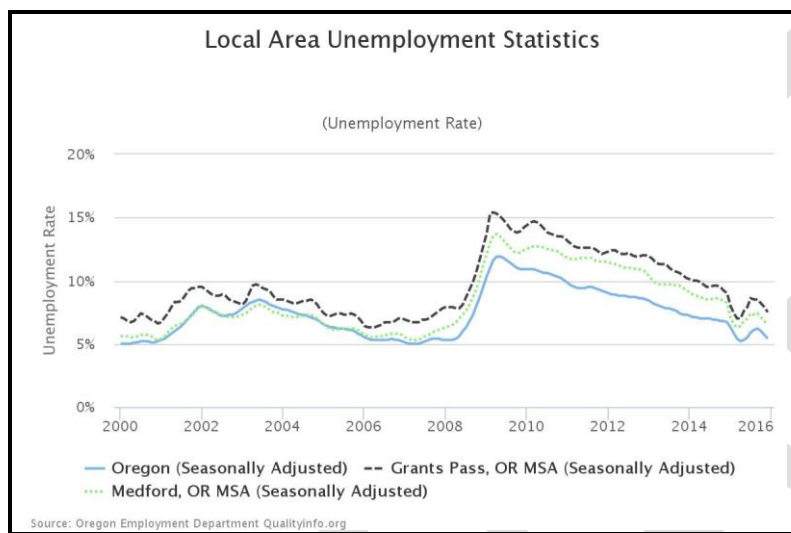
list require a bachelor's degree or higher level of education in order to be competitive. With so many of the high priority occupational training occupations being in healthcare, it isn't surprising to see a large share of occupational openings requiring a bachelor's degree or higher.

1.3 An analysis of the local workforce, including current labor force employment (and unemployment) data, and information on labor market trends, and the educational and skill levels of the workforce in the region, including individuals with barriers to employment. [WIOA Sec. 108(b)(1)(C)]

Local Workforce

The labor force of the Rogue Valley is representative of many rural Oregon areas, as well as the more highly educated and younger Portland Metro area. The labor force in rural areas tends to be older, unemployed more, and has less formal education. The Portland metro area has higher educational attainment and younger

workers. The Rogue Valley's labor force sits somewhere in between those two extremes.



Josephine County's total labor force recently peaked in 2009, at 35,332. After the recession, due to the weak job market, and workers either retiring or leaving the labor force due to being "discouraged" or leaving the area altogether, the labor force declined to 32,209 by 2013. During the past two years, improved economic conditions and continued population growth contributed an increase, with the civilian labor force rising to 33,170 in 2015.

Jackson County experienced a similar trend as the labor force declined from 102,309 in 2009 to 95,969 in 2013. Total labor force also rose during the past couple years, reaching 97,474 in 2015. The rural counties have higher unemployment rates, and typically are higher the farther they are from Portland. The Rogue Valley's two Metropolitan Statistical Areas - Grants Pass (Josephine County) and Medford (Jackson County) - have higher unemployment rates than the other Metropolitan Statistical Areas in Oregon, most recently 7.5% and 6.5%, respectively. Unemployment rates have been declining since the Great Recession, and are essentially back to pre-recession, more typical levels.

Total employment in the Rogue Valley is about 121,300. This figure includes the self-employed, agricultural workers, unpaid workers in their own business, workers on leave, and the usual payroll employees. Total employment fell by about 12,880 (-10.0%) in the Great Recession. It has climbed back by about 6,050 since then.

Education

At the total population level, the Rogue Valley's workforce seems to have sufficient education for region's future occupational openings. There will always be mismatches between the labor supply and skills of the workforce, and what employers are seeking in the job market. One of the roles of the local workforce board is to work to reduce these gaps and labor market mismatches.

Thanks to the presence of Rogue Community College in both Jackson and Josephine Counties, the region has a consistent balance of associate degree holders. **About 8.5 percent of expected job openings will require an associate degree at the competitive education level**, while the percent of the population holding associate degrees is about 7.5 percent. The situation is similar for openings needing a bachelor's degree or greater; 24

percent of the population holds that degree, and 21.6 percent of the expected openings will require a bachelor's degree or more at the competitive education level. The Rogue Valley benefits from the presence of Southern Oregon University as well, with the percent of those with Bachelor's degrees or more just a few percentage points below the statewide average, especially in Jackson County. Josephine County lags the statewide rate by about 14 percentage points, 17.1 vs. 30.8 percent statewide.

Educational Attainment for Population 25 and older	Oregon	Jackson County, Oregon	Josephine County, Oregon
Source: Census Bureau 2014 ACS	Estimate	Estimate	Estimate
Total:	2,746,957	147,982	61,141
Less than 9th grade	4.2%	3.8%	3.5%
9th to 12th grade- no diploma	6.1%	7.4%	8.9%
High school diploma or GED equiv	24.3%	27.7%	30.0%
Some college no degree	26.2%	27.4%	31.2%
Associate's degree	8.4%	6.8%	9.3%
Bachelor's degree	19.2%	16.3%	10.6%
Master's or more	11.6%	10.6%	6.5%

Only 11.5 percent of the population has less than a high school diploma, however, this does not put you at a competitive level of education for any Rogue Valley job openings from 2012-2022. At a minimum level of education there will be more occupations that require less education. For example, roughly 36 percent will require less than a high school diploma. But, at a competitive level of education, you would not be competitive for any job openings with anything less than a high school diploma. 48.9 percent of future occupational openings at the competitive level of education will need a high school diploma - 28 percent of the population can meet this need, and 60 percent exceed it.

The challenge is narrowing those mismatches, finding workers to fill the jobs that match the educational and skill requirements. As business needs change and evolve, the workforce system must adapt and be nimble to the changing skills requirements across the spectrum of occupational openings in the Rogue Valley. Retirements, outmigration, and those leaving the workforce are constantly being offset by newly-minted graduates from local education and training programs and those moving into the area. Although at the macro level, it would appear that the educational attainment level is sufficient to meet expected demand, there are continual shortages and surpluses of workers in various occupations and industries. The challenge for the workforce system is addressing these gaps and mismatches in a proactive and cohesive manor, rather than with a reactive, disjointed, haphazard and passive approach.

Finally, although the data indicates that 49% of regional jobs are identified as requiring a high school diploma at a competitive level of education, the RWP acknowledges that these are likely not family living-wage jobs. It is our Workforce Board's intention to support a multi-faceted set of strategies that includes a career pathways model which include training and education, as well as work-based training beyond high school. Our region is fortunate to have a wide variety of options for the potential, emerging, and incumbent labor force to improve their skills in different areas, increase their earning power, and expand their ability to take care of their families and live independently from basic human service support systems and funds.

Skills

There are no broad surveys of all current workers, or those who are able and seeking work. There are no skills-related questions asked on census forms of the general population. However, there are some sources of information that may approximate very broad representations of skills or knowledge of the population. There is little information about the work skills held by adults in the Rogue Valley, but the National Career Readiness Certificate (NCRC) program offers an optional, self-selected test of basic mathematics, reading, writing, and

locating information. It is commonly offered to high school students and people seeking employment services. The certificate shows four levels of ability: platinum (the highest), gold, silver, and bronze (the lowest).

Summary data on people who pass the test are available by county is as follows:

National Career Readiness Certificates Awarded Jan. 2012-January 2016						Percent of Goal Achieved
	Platinum	Gold	Silver	Bronze	Total	
Jackson	less than 4	852	1722	406	2999	100%
Josephine	less than 4	432	1085	307	1837	100%
Rogue Valley	N/A	1284	2807	713	4836	100%

The NCRC is part of a program to certify communities as being work-ready. This is primarily determined by the level of participation of workers and employers. The Rogue Valley has already met its goal and is a certified Work Ready Community.

Another skills assessment summary is available at the national, but not local, level. The Organization for Economic Co-operation and Development (OECD) conducted a 2013 survey of adult skills needed for the 21st century and published *The OECD Skills Outlook*. The United States was one of the countries surveyed. A few highlights from the extensive report included that 16-24 year old adults from the United States had mean literacy scores significantly below the OECD average. Mean numeracy scores for adults ages 16 to 65 were also significantly below average. And finally, adults ages 16 to 65 in the United States had mean scores in problem - solving in technology-rich environments that were significantly below average.

Barriers to employment

People have barriers to employment aside from insufficient education. Most jobs require the ability to speak English. Although most

people in the Rogue Valley do speak English, about 3 percent say they speak it less than very well. With a growing Latino population, being bi-lingual is increasingly a desired skill to possess.

Ability to Speak English. Ages 5 and over, 2010 to 2014			
	Jackson	Josephine	Rogue Valley
Total	194,614	78,852	273,466
Speak only English	176,333	74,994	251,327
Speak a foreign language at home	18,281	3,858	22,139
Speak English less than "very well"	6,885	824	7,709

Having a disability also constitutes a barrier to employment for many people. There are approximately 27,140 people age 18-64 that indicate that they had a disability from 2010 to 2014. About 7.5 percent of the employed workforce had a disability. People with a disability made up 11 percent of the unemployed, and 35 percent of those not in the labor force at all. All told, nearly 70 percent of people age 18-64 with a disability are not employed.

Population Employment Status by Disability Status, Ages 18 to 64, 2010-2014			
	Jackson	Josephine	Rogue Valley
Total:	122,907	46,382	169,289
In the labor force:	89,458	29,091	118,549
Employed:	81,297	27,151	108,448
With a disability	5,159	3,015	8,174
No disability	76,138	24,136	100,274
Unemployed:	8,161	1,940	10,101
With a disability	972	152	1,124
No disability	7,189	1,788	8,977
Not in the labor force:	33,449	17,291	50,740
With a disability	11,840	6,002	17,842
No disability	21,609	11,289	32,898

A criminal history is also a barrier to employment for many in the Rogue Valley. There are apparently no administrative counts or survey estimates of the number of ex-offenders in the region. A national study published by the Center for Economic and Policy Research estimated that in 2008 about one in 33 working age adults was an ex-prisoner, and about one in 15 was an ex-felon. This proportion would imply that about 5,130 ex-prisoners and 7,900 ex-felons live in the two counties.

1.4 An analysis and description of adult and dislocated worker workforce development activities, including type and availability of education, training and employment activities. Include analysis of the strengths and weaknesses of such services, and the capacity to provide such services, in order to address the needs identified in 1.2. [WIOA Sec. 108(b)(1)(D) & 108 (b)(7)]

The WIOA Adult and Dislocated Worker formula programs, combined with the Wagner-Peyser (WP) Employment Services (ES), and DHS-funded employment and training programs for individuals on public assistance (TANF-JOBS, SNAP-OFFSET) are critical pieces of the one-stop delivery system, and the hub spot for workforce development resources and activities for our community. The one-stop delivery system's intent is to be employer-driven, and to provide value-added, "just in time" career and training services for jobseekers and current workers. WorkSource Rogue Valley Centers in Medford and Grants Pass provide these services in our region.

Under WIOA, there are three types of "career services"³ basic career services, individualized career services, and follow-up services. For the purpose of moving toward greater clarity in defining how individuals are served under WIOA, a fourth category, "self-directed career services" was developed statewide. These services can be provided in any order, and allow one-stop service delivery approach to be customized and customer-centric.

- **Self-Directed Career Services** - Includes services that are developed or supported for delivery through web-based access and easily managed by participants through the My WorkSource site or other linked platforms. The self-directed services available in our local one-stop centers include, but are not limited to:
 - Typing tests;
 - Office Proficiency Assessment and Certification (which offers certifications in Windows computing and keyboarding; clerical and financial tests; customer service; and medical/ legal terminology);
 - Introduction to Workforce Services information session (which offers a comprehensive explanation of the array of career and training services offered through the one-stop system);
 - Use of the internet for online job search and access to thousands of online tutorials and courses such as, Kahn Academy; Coursera /Massive Open Online Courses (featuring free online courses from top universities), etc.;
 - Access to a fax machine and scanner for use in applying for jobs;
 - Up to 10 copies of a customer's resume per day;
 - Work Related Skills Review assessment (offered through iMatchSkills);
 - National Career Readiness Certificate Skills Labs taught by an instructor from Rogue Community College with subject matter focused on building basic skills in math, reading, and locating information.
- **Basic Career Services** - Includes services that are delivered by WorkSource staff either through workshops or one-on-one engagement. The services are generally lighter-touch assistance and carry no additional costs that must be paid to outside vendors on behalf of the participants. Basic career services include, but are not limited to:

³ TEGL No. 3-15 *Training and Employment Guidance for the Workforce Innovation and Opportunity Act*, dated July 1, 2015.

- Determination of whether an individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
 - Outreach, intake (including identification through the state's Worker Profiling and Reemployment Services system of unemployment insurance (UI) claimants likely to exhaust benefits), and orientation to information and other services available through the one-stop delivery system (Regs 678.430 (a.02))
 - Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skill gaps), and supportive service needs (Regs 678.430 (a.03))
 - National Career Readiness Certificate testing
 - Labor exchange services, including job search and placement assistance, information on in-demand industry sectors and occupations (as defined in sec. 2(23) of WIOA), and information on nontraditional employment (as defined in sec. 3(37) of WIOA);
 - Foundational Skills Workshops Program designed for individuals to get and keep a job (topics include How to Build Your Personal Brand Online and In Person, resumes and cover letters, interviewing, workplace culture, workplace communication, Using Emotional Intelligence in Customer Service, labor market information and training options);
 - Provision of referrals and coordination of activities with other programs and services, including those within the one-stop delivery system, and when appropriate, other workforce development programs (Regs 678.430 (a.09))
 - Provision of information relating to the availability of supportive services or assistance and appropriate referrals to those services and assistance, including: child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under the Supplemental Nutrition Program (SNAP); assistance through the earned income tax credit; housing counseling and assistance services sponsored through the U.S. Department of Housing and Urban Development (HUD); assistance under a State program for Temporary Assistance for Needy Families (TANF), and other supportive services and transportation assistance provided through that program⁴;
 - Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA, and information and assistance regarding filing claims under UI programs (Regs 678.430 (a.11))
- **Individual Career Services** - Includes services that are more staff-intensive or where there are outside costs associated with the engagement. Examples include, but are not limited to:
 - Comprehensive and specialized assessments of the skill levels and service needs of adult and dislocated workers through diagnostic testing and assessment (e.g., Initial Skills Review or NCRC);
 - Development of an individual employment plan to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve his or her employment goals, including the list of, and information about, eligible training providers (Regs 678.430 (b.02))
 - Group and/or individual counseling and mentoring;
 - JobNet- a weekly session facilitated by the Business Services staff, designed to target individuals who have proved their motivation and skills, and may require additional assistance to enter the workforce. Participants have been defined as "job ready" as evidenced by their completion of a Career Success Portfolio (which includes the certificate of completion for the Foundational Skills Workshops, the National Career Readiness Certificate, a resume, and a cover letter);
 - Career planning;

⁴ TEGL No. 3-15 *Training and Employment Guidance for the Workforce Innovation and Opportunity Act*, dated July 1, 2015.

- Short-term pre-vocational services, including development of learning skills, communication skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment of training Regs 678.430(b.06))
 - Work experiences or internships: Planned, structured learning experience takes place in a workplace for a limited duration and are linked in an in-demand career. May be paid or unpaid.(Regs 678.430(b.07))
 - Workforce Preparation activities such as forklift operator, Adult Basic Education (ABE/GED), Short-term vocational (e.g. forklift certificate), OSHA certification, Basic Life Support First Aid/CPR Certification, or Pre-Apprenticeship (681.480).
 - Follow-up Services must be provided as appropriate for participants who are placed in unsubsidized employment, for up to 12 months after the first day of employment.⁵
- **Training Services** - Allow an individual to build their employability, skills currency, and overall competitiveness in the job market. They also offer the capacity to respond to specific training needs for specific businesses, careers, and industries so that they have the human capital that they need to survive and thrive. Training services, when determined appropriate, are provided through an Individual Training Accounts (ITA), or through a training contract. Training services must be linked to in-demand employment opportunities in the region. The selection of training services is conducted in a manner that maximizes customer choice, is linked to in-demand occupations, informed by the performance of relevant training providers, and coordinated to the extent possible with other sources of assistance.

Training Contracts

Individual Training Accounts are the primary method used for providing training services. However, in certain circumstances a contract for training services instead of an ITA. For example, in our region, this contract option is used to fund services such as CPR Certification or fork-lift certification provided under Individual Career Services (see above).

- Individual Training Account: A financial obligation of WIOA funds made by WorkSource Rogue Valley to support classroom-based training or instruction in a program that is on the Eligible Training Provider List. ITAs may include the cost of tuition for Occupational Skills Training, fees (school, lab, etc.), and books required for the training program.

Occupational Skills Training: A specific occupational training designed to prepare an individual with the skill and knowledge to enter employment in a specific occupation or group of occupations, including Non-Traditional Employment (WIOA 134(c) (3)(D) i). Occupational Skills Trainings are funded through an ITA and supported through a robust Eligible Training Provider List (ETPL). This list is comprised of entities with a proven capability of securing quality employment outcomes for participants.

This includes:

- Industry-recognized credentials (e.g., CNA, AWS, etc.)
- Non-credit training and certificates (e.g., Customized Training, Badges)
- Credit certificates and degrees, including Career Pathways certificates at Rogue Community College and other training providers

Occupational Skills Training is focused particularly on the use of career pathways in the region's targeted industry sectors (Healthcare, Advanced Manufacturing, E-Commerce / Information Technology) to connect individuals to education, training and career momentum. Career pathways are sequences of high-quality education, training, and services connected to State and regional skill

⁵ TEGL No. 3-15 *Training and Employment Guidance for the Workforce Innovation and Opportunity Act*, dated July 1, 2015.

needs. Career pathways have multiple entry and exit points that allow individuals to achieve education and employment goals over time.

Work-Based Training

WIOA also provides enhanced access and flexibility for work-based training options, including⁶:

- Registered Apprenticeship: An apprenticeship registered with the State of Oregon Bureau of Labor and Industries providing occupational training that combines supervised on-the-job training experience with classroom instruction. Apprentices usually begin at half the salary of journey workers - those who have completed their training and have industry certification. Instead, apprentices receive pay increases as they learn to perform more complex tasks (WIOA 134(c) (3)(D) i and Regs preamble).
- On-the-job Training: Hire first training provided to a participant by an employer that is defined by a contract. On-the-job Training:
 - Provides knowledge or skills essential to the full and adequate performance of job;
 - Provides reimbursement to the employer of up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and the additional supervision related to the training; and
 - Is limited in duration as appropriate to the occupation for which the participant is being trained, taking into account the content of the training, the prior work experience of the participant, and the service strategy of the participant, as appropriate (WIOA 134(c) (3)(D) ii).
- Incumbent Worker Training: Training provided that meets the needs of employers to retain a skilled workforce or avert the need to lay off employees. It is conducted with a commitment by the employer to retain or avert the layoff of trainees, and requires employer cost-sharing (WIOA 134(c) (3)(D) iii).
- Transitional Jobs – Internships & Work Experiences: Are time-limited work experiences that are subsidized or non-subsidized and are in the public, private or nonprofit sectors for individuals with barriers to employment who are chronically unemployed or have an inconsistent work history, and are combined with comprehensive career and supportive services. The goal of transitional jobs is to establish a work history for the individual that demonstrates success in the workplace, and develop the skills that lead to entry into and retention in unsubsidized employment. Unlike OJT, there is no assumption that the individual will be retained in their transitional job after the experience is over, though that would be a successful experience and outcome. Currently, these services are provided to DHS-TANF customers (also co-enrolled in WIOA) at our WorkSource Rogue Valley Centers through either JOBS Plus or Work Experience placements.

The capacity to offer the above services and referrals is contingent on the availability of funding, as well as the myriad of benefits brought through strong local partnerships and regional coordination. The technical and practical “know how” for one-stop staff to career coach, counsel, and empower individuals to own their employment goals and to be committed to their own success is paramount as well.

Participants who enter post-secondary education through Adult Basic Skills programs may have access to federal financial aid to pursue credentials and degrees in preparation for the workforce. The Pell grant system as administered by the Federal Department of Education has revised its “Ability to Benefit” rule so that students who have not yet earned their GED are eligible for Pell grant if they are enroll in an eligible career pathway.

⁶ TEGL No. 3-15 *Training and Employment Guidance for the Workforce Innovation and Opportunity Act*, dated July 1, 2015.

Our region is fortunate to have two very exciting program funding streams starting in our region this year which greatly leverages our limited WIOA funds.

1. Southern Oregon HOPE is a federal Health Professions Opportunity Grant, received by Rogue Community College, through the U.S. Department of Health & Human Services, offering short term occupational training scholarships and supportive services for 17 healthcare options. It is available to low-income residents who are within 185% of the federal poverty level.
2. REACH Project provides similar short-term training services and scholarships offering training opportunities in healthcare, as well as other targeted industry sectors. It is funded through a special legislative allocation from the State of Oregon. This pilot investment strategy seeks to help low-income families overcome the many challenges, barriers and “benefit cliffs” needed to permanently leave public assistance and achieve long-term self-sufficiency. The REACH participants must either be on public assistance from Department of Human Services-specifically, receiving Temporary Assistance for Needy Families (TANF), Employment Related Day Care (ERDC) Assistance or similar Post-TANF services.

The strengths and weaknesses of the aforementioned career and training services are as follows:

Strengths	Weaknesses
<ul style="list-style-type: none"> ✓ Ability to offer “just in time” value-added services (versus the previous requirement of sequential services under WIA) ✓ Access to labor market information and processes in place that require jobseekers and current workers to utilize it ✓ Mechanisms in place for customer and staff feedback ✓ Foundational Skills Workshops Program that has proven success for individuals to gain skills and apply them on-the-job ✓ Customized training for individuals to learn on-the-job offers a unique solution for specific business needs ✓ Partnership with Wagner-Peyser funded programs and the Department of Human Services creates a seamless system for referrals and a safety net for customers ✓ ETPL creates a standard for local training and sets up individuals who obtain the training for success ✓ Incumbent Worker Training offers a competitive edge for businesses in the local economy to skill up their workforce which, in turn, creates career pathways, position vacancies, and the need to fill new jobs (thus creating new opportunities for jobseekers) ✓ Programs that are demand-driven and designed around the region’s sector strategies and other economic priorities ✓ Training investments target occupations with career pathways that result in sustained employment opportunities for customers and critical skills/talent assets for businesses ✓ An actively engaged, business-led Workforce Development Board that provides input on adult and dislocated programs to ensure continuous improvement as well as to maintain relevance to labor market needs 	<ul style="list-style-type: none"> ✓ Requirement of multiple data information systems to manage customer registration and information records ✓ Limited resources for programs impacts staff time for training “refreshers” and the development of new materials for jobseekers and current workers

1.5 An analysis and description of youth workforce activities, including activities for youth with disabilities. Identify successful models and best practices, for youth workforce activities relevant to the local area. [WIOA Sec. 108(b)(9)]

Our region is in compliance with the requirement that 75% of local WIOA youth funds must be spent on out-of-

school youth. We are also focused on work-based learning for both in-school (ISY) and out-of-school youth (OSY) and will meet the 20% minimum expenditure. We believe our current approach for serving ISY and OSY is working very well, and will continue to be refined through this first year of WIOA implementation. As a customer-focused program, all youth participants have access to the 14 youth program elements, based upon their needs and goals.

Our OSY services are contracted with ResCare, a for-profit workforce training corporation, and are embedded within the local WorkSource Rogue Valley Centers. We see several benefits to this structure as it leverages many services offered to our adult customers and prevents unnecessary duplication.

When a young person enters the WorkSource Rogue Valley Center, they are greeted and basic information is gathered verbally to determine if they would be best served with youth or adult services. If they are under 18, they are given a youth application and invited to attend a Youth Orientation Session. If they are between 18 and 24, have few barriers, have a work history, are already established in college or have a college degree or training credential, they will most likely be served in our adult program as we reserve our youth funds for those youth with more barriers to employment and education who will benefit from the additional supports than those provided to the adult customers.

Once a youth customer has attended an orientation and is determined to be eligible for WIOA services, assessments are completed. In partnership with youth staff, an Individual Service Strategy (ISS) is developed which captures the education and/or employment goals the youth wants to work towards and the action steps needed to achieve those goals. If youth are in need of, and interested in, obtaining their GED, this goal is also added to the ISS and they have the choice of enrolling in an online GED Academy or in a traditional GED program, whichever suits their transportation, schedule, and learning style best. To assist participants in identifying viable career paths in in-demand industries and occupations, youth engage in a three-week interactive career exploration activity named Career X. During this time, the cohort of youth explore career possibilities aligned with their interests and learn about the local labor market demand; tour local businesses and the local colleges; earn a National Career Readiness Certification, CPR/first aid card and food handler's permit; apply for federal financial aid; learn about workplace culture and communication; practice interviewing; and develop a career portfolio. The cohort model is effective in building a sense of belonging among the youth in the program and program staff. Upon successful completion of the competencies identified for the intensive program, youth become eligible for a paid work experience or on-the-job training, an entry level healthcare certification, as well as on-going job search assistance. If a WIOA Youth customer becomes ready for an adult program opportunity, such as on-the-job training, they will be dual registered into both WIOA adult and youth services as they move forward in their career path. **This includes potential participation in training services and scholarships funded through WIOA, Southern Oregon HOPE, and Reach described in Section 1.4.**

We also have a long history of partnership with Bureau of Land Management, US Forest Service, and more recently, National Fish and Wildlife Foundation. These partners provide funds for wages for youth crews to provide a variety of work on public lands (including invasive species removal, trail improvements, and habitat restoration) while learning about the importance of stewardship of our public lands. We feel fortunate that our youth have these training and work-based learning opportunities.

Our ISY services are contracted with College Dreams, a non-profit organization co-located in 11 of the high schools in our region. Their close working relationship with school administrators and teaching staff has proven to be a great asset for our WIOA ISY participants. For program year 2014, there was 96% attainment of high school diploma. We credit this high level of success with the top notch youth personnel who create strong relationships with the youth and the school staff. Participants are assisted in applying for all eligible financial aid for college. For school year 2014-15, \$665,320 in aid was awarded to the ISY enrolled in WIA services. This is a very impressive return on investment from the LWIB perspective and prepares these youth, who were mostly not college bound prior to program participation, to be successful in pursuing a college education. College

Dreams staff is also very collaborative with our local WorkSource Rogue Valley Centers and introduce youth to the services offered in the center, working with WorkSource staff to co-enroll youth into the adult programs, as appropriate.

College Dreams is also contracted by RWP to introduce the NCRC to school districts, and to offer proctoring and technical assistance. In Program Year 2014, 585 certificates were awarded to our local high school students. Seven months into Program Year 2015, the number awarded is over 900. School administrators and teachers are seeing the benefit of using this assessment to meet the essential skills requirements in math and reading. Beyond that, many districts are also beginning to see the value of introducing the NCRC certification as part of a more comprehensive career related learning approach that many of our school leaders are embracing as they are becoming more involved and committed to our region's College and Career for All Initiative, described in other sections of this plan.

Our youth services are going well and we do not anticipate major changes to our program delivery in the next four years. A few up and coming efforts to note include:

- Our OSY service providers will begin joining efforts with Central Medford High School, our region's largest alternative high school, to conduct home visits in an effort to recruit and engage targeted students who have been dropped due to lack of attendance and would benefit from WIOA services.
- Our OSY service provider and our ISY service provider are continuing to build a partnership with each other to ensure the needs are met for both IS and OS populations. During this process, emphasis is focused on creating a seamless process for the youth customer during their transition from one to the other.
- Our Local Leadership Team is convening a subcommittee to begin meeting spring 2016, dedicated to serving customers with disabilities. This group will address the needs of both adult and youth customers, and will identify gaps in our current system and strategize how to strengthen the system to be more responsive to, and relevant for, customers with disabilities. Efforts will also focus on supporting businesses in understanding The American's with Disabilities Act and their responsibility under the law. Our belief is that most businesses are open to employing individuals with disabilities, but they often lack the education on accommodations in the workplace.
- We are about to implement a policy for Youth Needing Additional Assistance. Service provider feedback has identified the following populations as youth in our community who may not qualify under the current WIOA approved barriers: Language Barriers, Limited or no work history, Limited school attendance, Lack of Parent Involvement, and Addiction. These qualifying barriers will be included in the policy.

Section 2: Strategic Vision and Goals

Please answer the following questions of Section 2 in eight pages or less. Section 2 responses should be greatly influenced by the members of the local workforce development board and other community stakeholders.

2.1 Provide the board's vision and goals for its local workforce system in preparing an educated and skilled workforce in the local area, including goals for youth and individuals with barriers to employment. [WIOA Sec. 108(b)(1)(E)]

About Us

The Rogue Workforce Partnership is a business-led coalition that works to strengthen the economy of the Rogue Valley. We catalyze and convene dynamic partnerships with business leaders, K-20 educators, workforce service providers, economic development, and other key community partners. Our focus is on building innovative solutions to address the workforce priorities and needs of employers, especially those in traded-sector industries that drive our region's economic growth. Working collaboratively across complex systems and institutional boundaries, we leverage and align resources to build the skills and talents of our region's workforce, so local businesses and career seekers can succeed in the modern global economy.

Our Vision

A strong regional economy and prosperous communities - fueled by skilled workers, quality jobs and thriving businesses.

Our Promise to Southern Oregon

- A more highly-skilled workforce built through partnership
- Align education, training & job placement efforts to meet the unique needs of local businesses and citizens
- Create a demand-driven, skills-based and integrated workforce delivery system focused on skills and talent development
- Accountability for results driven by the needs of business and the economy
- Strategic investments to increase Southern Oregon's economic competitiveness
- Evaluation and continuous improvement built upon what works

Our Goals & Strategies

Goal 1. Continue Building Our Industry Sector Strategy Partnerships

Potential Strategies

- Create a sustainable framework for locally-driven sector partnerships to understand, anticipate, and respond to the needs of business and industry.
- Foster positive perceptions in business and industry about a coordinated K-20 education and workforce system.
- Engage and interconnect Southern Oregon business leaders, K-20 educators, workforce agencies, economic development, and community partners to collaboratively address the talent pipeline needs of our region's key traded-sector industries: Advanced Manufacturing, Information Technology / E-Commerce, and Healthcare.
- Provide sector industry businesses customized workforce solutions to prepare and deliver qualified and viable candidates and advance current workers.

- Develop innovative, partnership-based solutions to address industry workforce needs at the top, middle and entry-levels of their skills pyramid.
- Use data to drive effort and outcomes.
- Work with appropriate partners to sustain and promote the quality of life amenities of the Rogue Valley that make it a highly desirable place to live, locate, and re-locate for employment or business start-up, retention or expansion. Support the Tourism and Hospitality industry as part of a comprehensive strategy to sustain our region as an attractive place to live and do business.

Goal 2. Continue building a customer-centric workforce system that is easy to access, highly effective, and simple to understand.

Potential Strategies

- Build the **WorkSource Rogue Valley** brand by continually innovating product and services to create exceptional customer experiences for both the business and job/career-seeking customers.
- Keep bridging the skills, training and information gaps that currently exist between the needs of business and job/career-seekers and students.
- Enhance our current framework for effective partnering within the workforce system and strengthen partnerships and alignment between workforce service providers.
- Align and leverage resources (data, funding, capacity, etc.) to collectively impact common outcomes and reward collaboration.
- Build accountability mechanisms focused on results.
- Build a solution-driven (vs. program-driven) culture.
- Market coordinated system services and unite communications and information sharing among workforce, economic development and education.
- Address the needs of individuals with barriers to employment [WIOA Sec. 108(b)(1)(E)]
- Adopt an equity lens in our investment strategies, policy-making and provision of services to eliminate success disparities in historically under-served populations.

Goal 3. Invest in Southern Oregonians to build in-demand skills, match training and job seekers to opportunities, and accelerate career momentum.

Potential Strategies

- Actively reach out and engage customers, especially target populations, about education, training, employment, and entrepreneurial opportunities.
- Empower Southern Oregonians with the access, knowledge, tools, and resources to launch and accelerate career momentum, including information on local in-demand skills and careers.
- Build **Foundational Work Skills** (*basic skills, work ethic, soft skills, etc.*).
 - Continue providing **Foundation Skills Training** to job/career seekers and expand curriculum offering to students/emerging workers.
 - Maintain our status as a **Certified Work Ready Community**, and continue using the **National Career Readiness Certificate** (NCRC) to validate essential work skills in reading, mathematics and locating information.
 - Continue to refer appropriate participants to Rogue Community College or Southern Oregon Goodwill Industries for Basic Skills remediation and GED test preparation.
 - Work with Adult Basic Skills / Title II and other partners to continuously improve, innovate and develop

a streamlined, effective, efficient and integrated system for improving adult basic skills and GED completion.

- Invest in **Talent & Skills Development** in targeted industry sectors:
 - Worksite-Based Training** – Continue to focus on Back-to-Work Oregon/On-the-Job training, JOBS Plus and Internship / Work Experience opportunities.
 - Occupational/Vocational Skills Training** – invest in existing and new career pathways models with demonstrated returns on investment.
 - Rethink & Restructure Training & Skills Development** - to include innovative and effective work-based learning and apprenticeship models that accelerate training. Create more opportunities and clear, effective articulations for skills and career growth between K-12, post-secondary training / education and work. Seek to establish more accessible “earn and learn” pathways and new “apprenticeship-style” models for middle-skills jobs in targeted industry sectors.

Goal 4. Create and develop talent by providing young people with information and experiences that engage their interests, spur further career development, and connect to Oregon employers.

Potential Strategies

- Continue building a seamless talent pipeline with K-12, higher education, post-secondary trainers, **WorkSource Rogue Valley** and other key community partners. As part of our Sector Strategy approach, connect in-school and out-of-school youth to opportunities in local sector partnerships.
 - College & Careers for All (CC4A)** – A partnership focused on transforming K-20 education, with a particularly strong focus on middle 40 students in the state’s 40/40/20 goal⁷, and on high-demand middle-skills jobs (*more than high-school, less than 4 year degree*). CC4A is focused on creating more project-based, hands-on and experiential learning. It integrates **STEM** (Science, Technology, Engineering, & Mathematics), **CTE** (Career-Technical Education), **Accelerated Learning/Dual-Credit** Programs, and **CRLE** (Career-Related Learning Experiences) to significantly improve academic success (*high school graduation, post-secondary training enrollment/completion, etc.*) for students and prepare them for career success. CC4A is one of three key pillars in our Southern Oregon Success initiative (*others are: Early Learning and Youth Development*).
 - Southern Oregon Success** - Our region’s cradle-to-career, “Collective Impact”⁸, Regional Achievement Collaborative⁹ brings together partners from healthcare, social services, early learning, K-12, higher education, community, workforce/economic development and business partners to create academic, life and career success for all children, youth and families. Partners are creating a holistic, seamless, and asset-based¹⁰ system of services/supports to help all youth overcome life obstacles and achieve academic and career success.
- As part of CC4A, RWP will spearhead K-20 Career-Related learning Experience (CRLE) partnerships with key Sector Strategy industries to increase exposure to job and career opportunities, improve work-readiness and awareness of employer expectation, and better connect school-to-work.
- Continue to partner, leverage and pursue additional resources for our local youth partnership initiatives.

⁷ <http://education.oregon.gov/#what-we-do>

⁸ See Stanford Social Innovation Review, Winter 2011: http://ssir.org/articles/entry/collective_impact

⁹ See Oregon Chief Education Office: <http://education.oregon.gov/regional-achievement-collaboratives/>

¹⁰ See links on: Trauma Informed Care/Adverse Childhood Experiences - <http://acestoohigh.com/2013/06/21/the-growing-interest-in-aces-and-trauma-informed-practices>; Circle of Courage: <https://www.starr.org/training/youth>; Search Institute Developmental Assets: <http://www.search-institute.org/content/40-developmental-assets-adolescents-ages-12-18> Resilience Education: <http://www.wholechildeducation.org/podcast/is-resilience-the-secret-to-student-success>

- Provide catalytic leadership, technical assistance and/or incentives to support adoption and expansion of work-based learning, apprenticeships, internships, career pathway articulations, etc.
- Build strong connections between Out-of-School Youth services, K-12 education and other community partners to ensure customer-centric seamless services and youth success.

Measuring Our Performance & Results

We will build upon our existing performance management efforts and work with our extensive partnership network partners to create a streamlined dashboard, and a related set of comprehensive performance metrics at our Sector Strategies and other appropriate work group levels. We will use this to track our success on what works, scale best practices, and learn and adapt from what doesn't work. These metrics will align, or in many cases be contiguous, with the College and Career for All and Southern Oregon Success performance metrics.

Examples of possible metrics include:

- Improved foundational skills, soft skills and related work ethic issues
- Improved skill attainment for job-seekers and students through industry-recognized credentials, career pathway certificates and/or completion of new apprenticeship-style trainings
- Training success and job placements in targeted Sector Strategy industries
- Job retention and career path progression of successful trainees
- Doubling the enrollment of Rogue Valley students in key Career-Technical Education programs at Rogue Community College or other training providers that lead to high-demand occupations in our targeted Sector Strategy industries
- Doubling the enrollment of Southern Oregon students at Oregon Tech and Southern Oregon University in career pathways that lead to high-demand occupations in our targeted Sector Strategy industries
- Improving the High School Graduation rate
- Business / Industry satisfaction with the skill-level and work-readiness of their talent pool
- Etc.

2.2 Describe how the board's vision and goals align with and/or supports the vision of the Oregon Workforce Investment Board (OWIB):

A strong state economy and prosperous communities are fueled by skilled workers, quality jobs and thriving businesses.

See Local Plan References and Resources.

RWP has crafted a new vision statement that is identical with the OWIB's vision. The RWP has also crafted our goals to be very closely aligned with, and in many instances identical to, OWIB's goals and strategies. Some variations exist to accommodate our region's specific priorities, circumstances and opportunities.

At the local level, the RWP wants to maintain our strong momentum of successful work in sector strategies, workforce system alignment and innovation, strategic investments in talent and skills development, and K-20 education and youth services alignment. These local priorities strongly align and support OWIB's vision.

The development of the RWP's 2016- 2020 vision, goals and strategies was strongly influenced by:

- OWIB's vision, goals and strategy.
- Input from employers and partners from "The Future of WorkSource" – a statewide series of Employer Forums, with one held in Medford in June 2014. See Attachment # 6 for additional information.
- Input from employer and partners from the 2015 Workforce Development Community Forum – a series

of statewide forums to provide input on OWIB and local strategic planning, with one held in Medford July 2015. See Attachment # 7 for additional information.

- The RWP's previous goals and strategies, and its strong momentum in creating the aligned K-20 education and workforce system needed to meet the demand of businesses and industry.

2.3 Describe how the board's vision and goals contributes to each of the OWIB's goals:

- Create a customer-centric workforce system that is easy to access, highly effective, and simple to understand.
- Provide business and industry customized workforce solutions to prepare and deliver qualified and viable candidates and advance current workers.
- Invest in Oregonians to build in-demand skills, match training and job seekers to opportunities, and accelerate career momentum.
- Create and develop talent by providing young people with information and experiences that engage their interests, spur further career development, and connect to Oregon employers.

The OWIB's strategic plan includes a number of strategies under each goal. Local boards are not expected to address how each strategy will be implemented. It is up to the discretion of the local board to determine what strategies best fit the local needs.

RWP's vision, goals and strategies are strongly aligned and almost identical with the OWIB's goals. The only difference is that our first focus is on Sector Strategies. We see Sector Strategies as the "point of the spear," or the "grounding rod" in all our efforts. One of our key strategies under this goal is to provide "customized workforce solutions to prepare and deliver qualified and viable candidates and advance current workers" (which is OWIB's goal). Our particular focus, first and foremost, is to do this for the high-demand, high-wage industries that fuel our region's economic vitality.

The RWP's remaining three goals (#'s 2, 3, and 4) are identical to OWIB's goals. We found it an easy exercise to adopt these goals. Our current momentum and efforts in creating workforce system alignment and innovation, making strategic investments in talent and skills development, and aligning K-20 education and youth services are a perfect fit into these goals. We also plan to pay particular attention to equity and access issues experienced by historically under-served populations. By assimilating the new OWIB state plan vision, goals and strategies into our local plan, we allow for a seamless alignment between the RWP and OWIB Strategic Plans.

2.4 Describe how the board's goals relate to the achievement of federal performance accountability measures. [WIOA Sec. 108(b)(1)(E)]

RWP's goals, as outlined in 2.1 above, increase our region's achievement of the federal performance accountability by building an educated and skilled workforce, including youth and individuals with barriers to employment, who will respond to local business demand and ultimately support regional economic growth and vitality. Our regional workforce coordination efforts, including One-Stop services, are delivered with the understanding that youth and adult job seeking customers who receive services that help them to become job ready as well as appropriate training opportunities are better poised to enter and retain unsubsidized employment, be placed in employment, education or training (youth measure), increase their earnings, earn a credential, and have in- program skills gain toward a credential or employment. We make business-informed investments to ensure that the services we offer to customers will relevant to our local employers as they make decisions about hiring, retention, and promotion. Our investment strategy is built upon the feedback we receive from representatives of

local industries and sectors, who say they need a skilled workforce with soft skills, occupational training, and work ethic. Although the WIOA Employer Measure has not been defined yet, we are confident we will adequately meet it as we are listening to, and responding to, the voice of business in our region.

DRAFT

Section 3: Local Area Partnerships and Investment Strategies

Please answer the following questions of Section 3 in 15 pages or less. Many of the responses below, such as targeted sector strategies, should be based on strategic discussions with the local board and partners.

3.1 Taking into account the analysis in Section 1, describe the local board's strategy to work with the organizations that carry out core programs to align resources in the local area, in support of the vision and goals described in Question 2.1. See Local Plan References and Resources. [WIOA Sec. 108(b)(1)(F)]

Our overarching strategy is to have our Sector Strategies efforts be the foundation for all our work. Building on these effective industry partnerships led by our RWP business leaders and grounded in the analysis in Section 1, we will then work to create alignment and innovation with all the workforce and K-20 education services in all the ways described in section 2.1. RWP staff convene and facilitate the leadership work groups described in Sections 3.2 and 3.3. to implement actions and activities to realize our regional goals and vision.

3.2 Identify the programs/partners that are included in the local workforce development system. Include, at a minimum, organizations that provide services for Adult Education and Literacy, Wagner-Peyser, Vocational Rehabilitation, Temporary Assistance for Needy Families, Supplemental Nutritional Assistance Program, and programs of study authorized under the Carl D. Perkins Career and Technical Education Act of 2006. See Local Plan References and Resources. [WIOA Sec. 108(b)(2)]

Partners and programs in the local workforce development system include:

<u>Partners</u>	<u>Programs</u>
College Dreams	WIOA Title I - In-School Youth
Crater Lake Joint Apprenticeship Training Center	Electricians Apprenticeship Training
Easter Seals	Homeless Veterans Reintegration Program
Experience Works	Senior Community Service Employment Program
Housing Authority of Jackson County	Self-Sufficiency Program
Options for Southern Oregon	Supported Employment Programs
Organization of the Forgotten American	USDOL - WIOA funded programs for Native Americans
Oregon Bureau of Labor and Industries	Apprenticeship & Training
Oregon Commission for the Blind	Employment Support for People with Vision Loss
Oregon Department of Human Services <ul style="list-style-type: none">• Self-Sufficiency• Office of Vocational Rehabilitation Services	TANF, SNAP, Employment Related Day Care Vocational Rehabilitation
Oregon Employment Department	Wagner-Peyser, Trade Adjustment Act, Migrant & Seasonal Farmworkers Program, Veterans Program, State Employment Department Administrative Funds
ResCare Workforce Services	WIOA Title I - Adult, Dislocated Worker & Out-of-School Youth
Rogue Community College	Title II/Adult Education & Literacy, CTE-Perkins, Workforce Training
Southern Oregon University	Continuing Education
U.S. Department of Veteran Affairs- Southern Oregon Rehabilitation Center and Clinics	Veterans Employment Program

3.3 Describe efforts to work with partners identified in 3.2 to support alignment of service provision to contribute to the achievement of OWIB's goals and strategies. See Local Plan References and Resources. [WIOA Sec. 108(b)(2)]

The Rogue Workforce Partnership staff convene monthly and quarterly meetings to align, coordinate, evaluate, and improve the overall effectiveness and return on investment of the workforce system.

Workforce and Higher Education System Partner (WHESP)

The partners identified in Section 3.2 meet quarterly as WHESP – a subcommittee of the RWP. The overall goal of the WHESP committee is to come together to analyze the effectiveness of how our agencies work together, identify and coordinate areas to streamline the steps that customers need to take to access our shared services, analyze the “flow” and usefulness of referrals between the various agencies, and to maximize the value and increase positive outcomes for our shared customers.

There are four WHESP subgroups that were formed to proactively focus on WIOA implementation and coordination, improving our shared customer’s experience, and increasing the success and sustainability of our shared outcomes.

- **Title II/ Adult Basic Skills Task Force** (Adult Education and Literacy) - Monthly meetings includes partners from Rogue Community College, Department of Human Services Self Sufficiency, WorkSource Rogue Valley (ResCare), Rogue Workforce Partnership, and Southern Oregon Goodwill Industries. Focus is on integrated program planning to create a seamless, asset-based, customer-centric / human-centered design¹¹ of services. The group is currently working on mapping out each of the Adult Basic Skills / GED services provided, and will be seeking to identify linkage and cross-referral points for common customers. Its on-going charge will be to continuously improve and innovate to create a highly streamlined, effective, efficient and integrated system for improving Adult Basic Skills and GED completion.
- **Registered and Non-Registered Apprenticeships Task Force** - includes partners from Rogue Community College, Bureau of Labor and Industries, private sector business leaders, Joint Apprenticeship Training Center (JATC), and Rogue Workforce Partnership.
- **Persons with Disabilities Task Force** - includes partners from Oregon Commission on the Blind, Vocational Rehabilitation, Southern Oregon Goodwill Industries, Handicap Awareness and Support League (HASL), Options, WorkSource Rogue Valley (ResCare and the Oregon Employment Department), and Rogue Workforce Partnership.
- **Local Leadership Team (LLT)** - This team consists of the lead program managers/directors from Title I Adult, Dislocated Worker, and Youth Services, Title III Wagner-Peyser Employment Services, Title IV Vocational Rehabilitation and Oregon Department of Human Services – Self-Sufficiency (TANF, SNAP, ERDC). This team meets monthly, with frequent sub-group meeting during the interim. The focus of this group is to coordinate on the management of WorkSource Rogue Valley and to align resources and coordinate the joint execution of our strategies and activities to achieve our vision and goals.

Sector Strategies • College & Career for All • Career Pathways • CTE/Carl Perkins

Coordination with CTE/Perkins at Rogue Community College is being made through our region’s College and Career for All initiative described under Section 2.1, Goal 4. Our Sector Strategy efforts and links to CTE/Perkins and career pathways (both current offerings at Rogue Community College, as well as new pathways and apprenticeships yet to be created) are described in Sections 3.10, 3.11 and 3.12. This CTE coordination links also to K-12 CTE programs of study and our regional STEM, CTE, Dual Credit/Accelerated Learning, and Career Related Learning Experiences for all appropriate K-20 education students.

The partners listed in 3.2 have participated in the process of defining and developing RWP’s strategic goals and strategies and will continue to participate in identifying specific tasks and deliverables.

¹¹ See IDEO & Human-Centered Design: <https://www.ideo.com/work/human-centered-design-toolkit/>

3.4 Describe strategies to implement the WorkSource Oregon Operational Standards, maximizing coordination of services provided by Oregon Employment Department and the local board's contracted service providers in order to improve services and avoid duplication. See Local Plan References and Resources. [WIOA Sec. 108(b)(12)]

As suggested in the WorkSource Oregon Operational Standards: "The Local Leadership Team (LLT) is the mechanism used to manage the implementation of the local WSO system." This includes coordination of services, programs, funding streams, processes and initiatives among WSO partners to ensure accountability and alignment in support of a seamless public system.

Since TANF-JOBs and SNAP-OFFSET services are provided in our WorkSource Rogue Valley Centers, our region's LLT is comprised of leaders from WorkSource Rogue Valley (both, Oregon Employment Department and ResCare), the Department of Human Services (Self Sufficiency and Vocational Rehabilitation), as well as the Rogue Workforce Partnership. The objective of our group is to address both systems and operational topics related to service delivery issues and improvements; implementations of programs, process and current initiatives; center activities such as workshop offerings, customer flow (discrete resource room activities), and staff coordination/coverage; program and center performance; best practices identification and improvement; sector strategy implementation; business recruitment services; and implementation of local area strategic plans as they relate to center functions. LLTs also serve as a communication between regional, local area and center levels.

The LLT has identified shared outcomes to track across agencies in order to evaluate and improve the system using data-driven decisions. These outcomes include:

- Increased job placements (including subsidized and unsubsidized employment)
- Increased customer satisfaction (including both, jobseekers and employers)
- Identification and tracking of talent pools and target populations to support our region's sector strategies efforts and high-demand occupations that are in growing industries
- Engagement of underemployed and/or discouraged workers (with an emphasis on individuals that fall within our target populations)
- Tracking of certificate attainment (including NCRC and other nationally recognized certificates, vocational licenses, and educational diplomas)
- Increased coordination and execution of a shared business briefcase as evidenced by an increase in enhanced listings, customized recruitment, on-the-job training placements, JOBS Plus placements, as well as work Experience and internship placements

There are also subgroups that meet on a frequent basis to address the following:

- Co-location of one-stop center facilities in Medford
- Identifying, developing, and tracking sector-specific talent pools and priority populations
- Building a shared briefcase and conducting coordinated business outreach
- Identifying criteria and creating definitions for tracking "work ready" talent pools

Integration and coordination of WorkSource Rogue Valley services (including Wagner Peyser-funded and WIOA-funded center activities, products, and programs).

3.5 Identify how the local board will carry out a review of local applications submitted under WIOA Title II Adult Education and Literacy, consistent with the local plan and state provided criteria. See Local Plan References and Resources. [WIOA Sec. 108(b)(13)]

RWP will follow the guidance provided by the Community College and Workforce Development in reviewing applications for Adult Education and Literacy Providers. The local area's unified plan will be reviewed in this process to ensure that the applications are aligned with the direction of the workforce board and local strategic plan. RWP may use a board advisory work group, checklists, or scoring matrices to aid in this process for a timely decision-making process.

3.6 Describe efforts to support and/or promote entrepreneurial skills training and microenterprise services, in coordination with economic development and other partners. [WIOA Sec. 108(b)(5)]

Our region is strongly committed to supporting entrepreneurship. We recognize that successful entrepreneurs are a key driving force to sustained economic vitality for our region. The Rogue Valley has a high percentage of business start-ups, and many are in key traded sector industries such as Advanced Manufacturing and Information Technology / E-Commerce. In addition to the services and referrals provided through WorkSource Rogue Valley, the key capacity for entrepreneurial skills training is through the array of partners described below.

The Oregon Employment Department's Self-Assistance Program is widely promoted by WorkSource Rogue Valley staff, in addition to the region's Small Business Development Centers (located at Rogue Community College in Grants Pass and Southern Oregon University in Medford). There are also a myriad of programs offered through Southern Oregon Regional Economic Development Inc. (SOREDI), to support small business start-ups and business development.

SOREDI, the region's economic development agency, is co-located in the RWP office and works very closely with our staff. As the center of gravity for business development in Southern Oregon, SOREDI offers access and referrals to the following programs locally (for more information, visit <http://soredi.org/launch/>):

- SOREDI's Angels and Entrepreneurs (A&E)
- Southern Oregon Angel Investment Network
- Oregon Entrepreneur Network (OEN)
- Sustainable Valley Technology Group (SVTG) – business accelerator
- Rogue Community College/AVISTA Center for Entrepreneurship
- SOREDI's Technical Assistance Group (TAG)
- SOREDI's Sounding Board (SB)

Our region's microenterprise service organization (SOWAC) ceased to exist a number of years ago. Since that time, micro-lending capacity has not been available in the region. Individuals interested in entrepreneurship are referred to the services above for start-up support.

Entrepreneurship is also strongly promoted throughout our partnerships with K-20 education partners. The partners listed above work collaboratively with K-20 partners to provide presentations, mentorships and other supports to interested and emerging entrepreneurs.

3.7 Describe how the local board coordinates education and workforce investment activities with relevant secondary and postsecondary education programs and activities to coordinate strategies, enhance services, and avoid duplication of services. [WIOA Sec. 108(b)(10)]

- In addition to the response in Section 3.1 with regard to WHESP, LLT and Adult Basic Skills / Title II work

group, RWP also convenes other regular meetings with partners to coordinate education and workforce investment activities. For example, the HPOG/SOHOPE grant with Rogue Community College, and the REACH – TANF Education Pilot grant have required extensive implementation planning work with multiple partner organizations to ensure seamless program coordination between these program and the other services provided through WorkSource Rogue Valley.

- RWP leaders also provide catalytic leadership, in partnership with the Southern Oregon Education Service District, in our region’s College and Career for All. CC4A focuses on integrating STEM (*Science, Technology, Engineering, & Mathematics*), CTE (*Career-Technical Education*), Accelerated Learning/Dual-Credit Programs, and Career-Related Learning Experiences (CRLE) to significantly improve academic success (high school graduation, etc.) for students and prepare them for career success.
 - RWP business leaders convene and facilitate industry sector groups in Advanced Manufacturing, Information Technology / E-Commerce, and Healthcare. Workforce work groups include participants from relevant secondary and postsecondary education programs.
 - RWP staff convene/facilitate or participate in additional program alignment work sessions with workforce and K-20 education partners.
- The above meetings and work sessions focus on topics such as:
 - Aligning Accelerated Learning/Dual-Credit, career pathways, curriculum, industry recognized credentials, and WorkSource Rogue Valley training investments with industry sector demands.
 - Validating or creating new career pathway models or new “apprenticeship-style” training partnerships in targeted industry sectors.
 - Identifying industry recognized credentials that local business want to see students and job/career seekers obtain.
 - Planning coordinated activities on STEM, CTE, Accelerated Learning/Dual-Credit, and CRLE coordination. Comprehensive strategy and event planning sessions on coordinated career fairs, industry tours, tech talks, job shadow and internships for students and job/career seekers. Creating project-based, hands-on learning opportunities for students and job/career seekers.
 - Leveraging capacities, creating innovative partnership solutions and eliminating duplication of services through coordinated effort.

3.8 Describe efforts to coordinate supportive services provided through workforce investment activities in the local area, including facilitating transportation for customers. [WIOA Sec. 108(b)(11)]

Supportive services, including transportation, are coordinated through:

▪ **Integrated Program Design & Delivery, Coordination & Collaboration**

Our region benefits from a high level of service integration between WIOA, DHS Self-Sufficiency (TANF, SNAP), Wagner-Peyser, Trade Adjustment Act, and other workforce training programs. RWP and Oregon DHS jointly procure and manage the same service provider to provide integrated employment and training services for these programs that are all provided at the WorkSource Rogue Valley Centers. Interested and appropriate TANF, SNAP and ERDC customers are co-enrolled in WIOA, and both training investments and support service resources are coordinated at the frontline staff and supervisory level to ensure smooth service delivery and customer success.

Our region’s workforce system partners, including Vocational Rehabilitation, Rogue Community College’s Adult Basic Skills Department, Department of Human Services Self Sufficiency, and other system partners such as Southern Oregon Goodwill Industries, are actively communicating and coordinating resources, including funding for supportive services and transportation for shared customers. It can become challenging without this level of coordination because although WIOA should be the payer of last resort,

several of our partners are also Title I or Title II recipients. It is standard practice in our region to staff such cases and agree that when one entity pays for training, another might provide supportive services, transportation support, etc. We are strengthening these relationships through participation and planning during our Local Leadership Team meetings.

Other special grant programs, such as Trade Adjustment Act, Dislocated Worker - Rapid Response, and Health Professions Occupations Grant (HPOG) that also provide support service capacities are leveraged, as appropriate, as part of this same coordinated and collaborative process.

▪ **Policy, Practice and Staff Development**

Programs directly funded by the RWP must follow the Support Service Policy of the local board (see Attachment #8. WIOA resources to fund supportive services are extremely limited, and experience has shown us that they can quickly be exhausted, leaving significantly diminished capacity to invest in training. Our local board policy allows for the provision of supportive services at the discretion of the service provider. For WIOA-only customers, we foster the coordination and leveraging of other personal and/or community resources to fill these needs, so that our training investments can be used to their highest capacity. Training and best practice sharing for frontline staff is routinely provided to ensure effective coordination of resources.

3.9 Based on the analysis described in Section 1.1-1.3, identify the populations that the local area plans to focus its efforts and resources on, also known as targeted populations.

As outlined in WIOA sec. 134(c)(3)(E), Adult funds will be used to give priority to veterans and their spouses, recipients of public assistance, other low-income individuals, and individuals who are skills deficient for the receipt of career services and training services. The One-Stop Centers may provide individualized career services to individuals who do not fit the definition of targeted populations, but priority will be given to the targeted populations regardless of funding levels.

Discretionary funds will be used to serve other special populations that do not fit the target population definition or qualify for dislocated worker program funding, but who need career and training services to reach self-sufficiency and meet local employer demand for a skilled workforce. These populations include, but are not limited to, individuals with disabilities, offenders, and young adults.

3.10 Based on the analysis described Section 1, identify one to three industries where a sector partnership(s) is currently being convened in the local area or there will be an attempt to convene a sector partnership and the timeframe.

The Rogue Workforce Partnership's Healthcare Workforce Steering Committee was established as a sector strategy group in December, 2012 and meets on a quarterly basis.

The RWP, in collaboration with Southern Oregon Regional Economic Development Inc., (SORED) has been facilitating a "Tech Collective" with companies representing information technology and electronic commerce. This group kicked off in December and has had two meetings since. It will likely meet on a recurring basis, once each month.

Rogue Advanced Manufacturing Partnership (RAMP) kicked off in October and has been meeting on a monthly basis. This group is in process of becoming a collaborative effort with SOREDI as well.

3.11 Based on the analysis described Section 1, describe the local investment strategy toward targeted sectors strategies identified in 3.10 and targeted populations identified in 3.9.

Healthcare

The Healthcare Steering Committee was established to identify and influence issues concerning immediate and long-term education and workforce development for healthcare organizations in our region. See Attachment #9 for more information on the work that this group has been making progress on since 2012.

Advanced Manufacturing

It was clear from the discussion that industry leaders believe that there are many opportunities that can drive growth of the sector in the region. A combination of growing markets, new products and services, and new technologies will be important catalysts. The region's distinctive attributes as a smaller, but diverse and agile, advanced manufacturing hub will also be a plus. Specific opportunities included:

- Growing markets, including the new customers from existing products, and the global impact on manufacturing of the "Internet of Things."
- New products and services, from new combinations of technologies to precision coatings to new kinds of services to other manufacturers.
- New technologies, both product and process technologies, that improve efficiency and disrupt markets, rapid prototyping, new applications in healthcare, and others.

Requirements to Grow Advanced Manufacturing in the Region -- and Initial Champions for Action

To capitalize on these promising opportunities for growing advanced manufacturing, industry leaders considered a number of areas for action, and settled on three major priorities:

- Expand the advanced manufacturing talent pool, including filling the talent pipeline. Create a collective voice on essential skills/key occupations needed for advanced manufacturing; launch a "fill the pipeline" strategy to promote the industry with youth; and develop specific partnerships with local education to transform the way people are prepared for advanced manufacturing careers (e.g., internships and other workplace experiences, teacher tours, curriculum supplements).
- Improve the infrastructure for expansion of advanced manufacturing companies. Identify the specific infrastructure requirements to support expansion, including land/facility availability and affordability; development/permitting processes that are fast and flexible, and allow for companies to locate/expand closer to community amenities; and transportation that ensures companies are accessible to outside markets (air) and their employees (public transportation). Incorporate needs of advanced manufacturing into community planning, permitting, infrastructure investment, and other public processes.
- Grow business-to-business partnering, increasing levels of local purchasing/suppliers, cost reduction, company innovation, and industry agility. Invite the diverse base of advanced manufacturing companies to participate in an ongoing forum, a focal point for meeting the full range of local companies and forging specific company-to-company partnerships. Pick one or more high-value targets for collective action or shared services benefiting many companies, form team(s), and execute.

Information Technology / E-Commerce

The Rogue Tech Collective kicked off in December 2015 and has been hard at work identifying action items and planning the steps for executing early wins and long term goals. The group consists of local business leaders, Rogue Community College, Oregon Tech, Southern Oregon University, and partners from K-12.

With the thought in mind that “a rising tide raises all boats,” the Collective’s number one priority is to grow the presence of technology companies and the awareness of technology careers in the Rogue Valley. Plans for early wins include the following:

- Creating a presence at Oregon Tech’s Career Fairs and making better connections with faculty in the computer science department.
- Planning a local industry tour event that targets students at OIT and SOU and showcases the awesome tech companies and careers in the Rogue Valley.
- Planning a local industry tour event that targets parents and K-12 students to showcase the awesome tech companies and careers in the Rogue Valley.
- Creating awareness videos highlighting tech companies and careers that can be shared with one-stop contractor customers, staff, education partners, and other local stakeholders.

As the group continues to meet, they will identify longer term goals that haven’t fully been fleshed out, but will likely include “gaining a presence on any top 10 places to live, work, and own a business.”

Local Investment Strategy Toward Targeted Sectors

In order to maintain consistency and establish accountability for our local training investments, our region employs the use of a “decision-making matrix” in addition to the area’s individual training account policy. The matrix has two areas: the customer’s demonstration of need (based on characteristics that compose many of the barriers that targeted populations are faced with), balanced with the quality of the investment and the ROI for a business that falls within our region’s sector strategies. Preference is given to ITAs that fall within our region’s sector strategies.

RWP will deploy resources in alignment with WIOA priority of service requirements for targeted populations, as outlined in 3.9.

3.12 Identify and describe the strategies and services that are and/or will be used to:

- A. Facilitate engagement of employers, including small employers and employers in in-demand industry sectors and occupations, in workforce development programs in addition to targeted sector strategies
- B. Support a local workforce development system described in 3.2 that meets the needs of businesses
- C. Better coordinate workforce development programs with economic development partners and programs
- D. Strengthen linkages between the one-stop delivery system and unemployment insurance programs

This may include the implementation of incumbent worker training programs, on-the-job training programs, work-based learning programs, apprenticeship models, customized training programs, or utilization of effective business intermediaries and other business services and strategies that support the local board’s strategy in 3.1.

[WIOA Sec. 108(b)(4)(A&B)]

A. Employer Engagement

- The WorkSource Rogue Valley’s (WSRV) integrated Business Service Team (comprised of OED and ResCare staff) are continually engaging employers in workforce development programs. These include small employers and employers in in-demand industry sectors and occupations, both in targeted sector strategies, as well as other employers.
- As described in Section 3.10 and 3.11, RWP business leaders and staff are engaged in sector strategy efforts with targeted industry employers to engage them in workforce development programs as a means to address their workforce priorities.

- Our combined RWP and WSRV business engagement team is also working with groups such as the Chambers of Commerce, Society of Human Resource Managers, Oregon Employer Council, and Rotary to coordinate shared events and activities to engage all employers in workforce development programs

B. A Workforce Development System that Meets Business Needs

The efforts described in Section A above and Section 3.10 and 3.11 are all designed to create a workforce development system that meets the needs of business. Through our RWP business-led efforts, we are crafting a workforce system that really listens to businesses and offers services and solutions that solve their workforce needs. Employer Forum sessions convened in 2015 affirmed a high priority from business leaders on more investments on worksite training such as On-the-Job Training. Employers are looking for partnership help from public sector programs to reduce the cost and risk of on-boarding employees with the right set of tangible and intangible work skills. We have responded by continuing to prioritize this high priority investment strategy.

In addition, RWP business leaders are spearheading efforts to create a more seamless partnership between industry, K-20 education and the workforce system. The goal is to forge together a comprehensive array of training experiences across this continuum that includes: career/job fairs, industry tours, tech talks/classroom presentations, job shadows, internships, On-the-Job training programs, work-based learning programs, apprenticeship models, customized training programs, and incumbent worker training programs. These opportunities would be for K-12 and postsecondary training/education students, as well as job/career seekers from WorkSource Rogue Valley. Experience tells us that the more employers engage in these activities, and the more they actively participate in the training and development of future workers, the better we're able to fill the talent pipeline. This comprehensive cooperative training and education model is the key strategy we're employing to create a workforce development and education system that meets the needs of employers.

C. Economic Development

The workforce and economic development partners in our region work in extremely close collaboration and partnership. SOREDI and RWP staff:

- Are co-located in office space and cubicles that are immediately adjacent to each other that allows for routine, daily and serendipitous team-based coordination.
- Meet regularly to strategize and jointly plan industry sector strategy meetings, industry tours, special events, outreach visits, etc.
- Conduct industry site visits together, and/or cross-refer to each other for appropriate follow-up work with industry leaders.
- Engage in joint grant-writing.
- Continuously seek new ways to enhance our partnership, joint effectiveness and benefit to the businesses we serve.

D. Strengthen Linkage between One-Stop System & UI programs

Our core strategy in this arena is to strongly link our Sector Strategies work to the transformation work underway in our One-Stop Centers. UI clients are required to come into the WorkSource Rogue Valley Centers and are given the opportunity to improve their skill and job placement prospects. Our goal is to create new career pathway and apprenticeship-style training programs that can link them to high-demand, high-wage jobs in our targeted industry sectors. We are optimistic that by marketing such opportunities to UI clients, we will generate high interest, motivation and follow-through into these training pathways.

3.13 Does the local board currently leverage or have oversight of funding outside of WIOA Title I funding and state general funds to support the local workforce development system? Briefly describe the funding and how it will impact the local system. If the local board does not currently have oversight of additional funding, does it have future plans to pursue them?

Our region's service delivery model is built on the foundational premise of partnership, service integration and leveraged resources. This includes:

- WIOA
 - Title I Adult, Dislocated Worker, and Youth Services (*RWP / ResCare*)
 - Title II Adult Education and Literacy (*Rogue Community College*)
 - Title III Wagner-Peyser Employment Services (*thru OED - Oregon Employment Department*)
 - Title IV Vocational Rehabilitation (*DHS – Office of Vocational Rehabilitation Services*)
- State Employment Department Administrative Funds (*SEDAF thru OED*)
- Trade Adjustment Act (*thru OED*)
- Back-to-Work Oregon & Sector Strategies (*RWP thru State General Fund*)
- Oregon Department of Human Services Self-Sufficiency employment and training programs (TANF-JOBS and SNAP OFFSET and SNAP 50/50) (*ResCare*)
- Southern Oregon Goodwill Industries
- Oregon Commission for the Blind
- Experience Works (Senior Community Service Employment Program, Ticket to Work)
- U.S. Veterans Administration - Southern Oregon Rehabilitation Center & Clinics
- Jackson County Housing Authority / HUD Self-Sufficiency Program
- Rogue Community College – Workforce Training Programs
- Other federal and state grants

Through the RWP's Workforce & Higher Education System Partners (WHESP) Subcommittee, these system partners meet regularly to identify system gaps and to coordinate, leverage and align resources in order to create a more seamless service delivery experience for common customers.

The RWP does not currently have oversight on any of the funds, outside of WIOA Title I funding and the Back-to-Work Oregon and Sector Strategies state general funds. The RWP is a strong advocate for integrated oversight and administration in these workforce programs. We, as well as the U.S. Department of Labor, have long advocated that Oregon adopt a more fully integrated workforce system approach such as those found in Texas and Florida. However, we recognize that our capacity to influence these alignment efforts at the local level is extremely limited. Our current plan is to await the outcome of the state-level leadership initiative currently underway to integrate and align oversight of programs administered by Oregon Office of Community College and Workforce Development / HECC, Oregon Employment Department, Department of Human Services, and Office of Vocational Rehabilitation Services. We will also continue to advocate, along with other our other local Workforce Boards in Oregon, for the Governor, Legislature and state agency leaders to pursue such oversight integration and administrative streamlining.

Section 4: Program Design and Evaluation

Please answer the following questions of Section 4 in 12 pages or less. Many of the responses below, such as career pathways and individual training accounts, should be based on strategic discussions with the local board and partners. The local board is not required to complete the questions shaded in gray at this time.

4.1 Describe how the local board, working with the entities carrying out core programs, will expand access to employment, training, education, and supportive services for eligible individuals, particularly eligible individuals with barriers to employment. [WIOA Sec. 108(b)(3)]

RWP will expand access by deploying resources for eligible individuals, particularly targeted populations, as described in 3.9. Additionally, we have strong partnerships in our region and leverage non-WIOA funding as much as possible to assist customers with education and training costs.

4.2 Describe how the local board will facilitate the development of career pathways, consistent with the Career Pathways Definitions. See Local Plan References and Resources. [WIOA Sec. 108(b)(3)]

RWP is working closely with K-20 education, local business and sector leaders to expand upon the current on-the-job training, internships, apprenticeships, industry recognized credentials, credit and non-credit degrees and certificate opportunities already in existence in our region. It is through these deliberate, concentrated efforts that we will clearly articulate local Career Pathways for our region that support employer demand and local labor market projections and help inform post-secondary service providers to align education and training programs with the skill needs for our area.

4.3 Describe how the local board will utilize co-enrollment, as appropriate, in core programs to maximize efficiencies and use of resources. [WIOA Sec. 108(b)(3)]

Individuals accessing services at WorkSource Rogue Valley are co-enrolled in employment and training services. Staff are cross-trained to understand the delivery of partner services in an effort to maximize efficiencies and the use of resources.

The Rogue Workforce Partnership recently developed a funding matrix as a tool for staff to use, with the goal of maximizing efficiencies, coordination, and the use of resources. The matrix is an ever-changing, “live document” that unpacks the following:

1. Specific program funding stream (or discretionary grant) priority for expending funds;
2. Eligibility perimeters and fund definitions;
3. Opportunities for co-enrollment;
4. Target number of individuals to serve in career or training services;
5. Limitations to be aware of.

Interactive trainings for contractor staff will be held on an intermittent basis (as needed) to provide support in understanding the purpose and benefits of co-enrollment, increasing cost efficiencies for serving customers, as well as to review overall performance outcomes.

4.4 Describe board actions to become and/or remain a high-performing board, consistent with the factors developed by the Oregon Workforce Investment Board. These factors have not been determined but will include effectiveness and continuous improvement criteria for local boards to assess one-stop centers, guidance on one-stop center infrastructure funds, and roles and contributions of one-stop partners. See Local Plan References and Resources. [WIOA Sec. 108(b)(18)]

RWP actions will be identified once Oregon Workforce Investment Board has developed factors, criteria, etc.

4.5 Describe one-stop delivery system in the local area, consistent with the One-Stop Center Definitions including:

- A. The local board's efforts to ensure the continuous improvement of eligible providers of services, including contracted services providers and providers on the eligible training provider list, through the system and ensure that such providers meet the employment needs of local employers, and workers and jobseekers. [WIOA Sec. 108(b)(6)(A)]

Since the local board is very active in our region's sector strategies and other workforce development activities, there is ample opportunity to collect feedback directly from business leaders, as well as from economic development partners, regarding whether the eligible training providers meet the needs of the local business community. As such, the local board is able to provide this feedback directly to the local training providers and will often invite the said training provider to a strategy session. Past sessions have been focused on improving the quality (or expanding the opportunities) for education and training in high-demand occupations found in growing industries.

The Rogue Workforce Partnership has also implemented a strategy for evaluating the effectiveness of the trainings provided by eligible providers (and accessed by jobseekers and current workers) by building criteria into the performance measures for the board's contracted service provider. The metric is specifically focused on the effectiveness of the training that the customer receives on an ITA as evidenced by whether the customer gained employment in an occupation consistent with the training that they received.

The WIOA requirement that all Eligible Training Providers renew their applications to maintain their position on Oregon's list creates a great opportunity to communicate and collaborate with current training providers. The Rogue Workforce Partnership is capitalizing on this chance to connect with providers to promote continuous improvement and enhance the availability and promotion of such trainings as well as their articulation to the workforce.

- B. How the local board will facilitate access to services provided through the one-stop delivery system in remote areas, through the use of technology, and through other means. [WIOA Sec. 108(b)(6)(B)]

The board is currently facilitating access to services in remote areas through the use of a mobile computer lab. Additionally, our region's strong partnerships with the Josephine Community Libraries, Jackson County Libraries, Illinois Valley Family Coalition, Department of Human Services, and other Community Based Organizations creates additional opportunities for our shared customers to access online services.

There is a host of online platforms for accessing labor market information and job search tools available through <http://worksourcerogue.org/>, <http://www.oregon.gov/employ/pages/default.aspx>, and other various platforms hosted through the regional community library systems, local school districts, and higher education partners.

In the future, the goal is to begin streaming workshops, orientations, and information sessions to remote areas; however, the demand for this service needs to be evaluated and supported by data prior to implementing. There are also plans to purchase two computers for each one-stop center to be utilized for streaming interviews and additional online communication and collaboration.

- C. How entities within the one-stop delivery system, including one-stop operators and the one-stop partners, will comply with WIOA section 188, if applicable, and applicable provisions of the Americans with Disabilities Act of 1990 regarding the physical and programmatic accessibility of facilities, programs and services, technology, and materials for individuals with disabilities, including providing

staff training and support for addressing the needs of individuals with disabilities. See Local Plan References and Resources. [WIOA Sec. 108(b)(6)(C)]

A local representative from Vocational Rehabilitation is in the region's WorkSource Rogue Valley Centers once a week to work closely with the WorkSource Talent Development Specialists and meet customers on site as well. We value the partnership that is producing successful paths to employment for customers who are appropriate for referrals.

All ResCare Contractor staff are required to take All Staff training via the ResCare Intranet soon after hiring. Included in the All Staff training curriculum is *Supporting People with Disabilities*. The *Supporting People with Disabilities* training curriculum includes these components:

- Understand the purpose of the ADA
- Learn communication tips for working with people with disabilities
- Learn tools and resources to assist in serving people with disabilities in workforce centers. Included in these resources is a link to www.askjan.org, information about the Oregon Council on Civil Rights, and information about how to access Oregon Telecommunications Relay Services to accommodate those who are hearing and sight impaired.

Our One-Stop facilities are ADA compliant for access, we display posters for sign language interpreter needs, provide a computer station in the Resource Rooms that has the larger keyboard keys and the ability to show info in larger font, and is wheelchair accessible. A designated staff person serves as Equal Opportunity Officer. Our Local Leadership Team is creating a shared outcomes dashboard and an area of emphasis is ensuring that individuals with disabilities receive accessible and equitable services within our system. LLT will identify and correct any issues.

D. Describe the roles and resource contributions of the one-stop partners by providing a summary of the area's memorandum of understanding (and resource sharing agreements, if such documents are used). [WIOA Sec. 108(b)(6)(D)]

Both the Memorandum of Understanding (MOU) and Resource Sharing Agreement (RSA) will be updated in the spring of 2016. The RWP will convene WHESP partners (see response to question 3.1) to create the new MOU and RSA.

- We anticipate that the MOU agreements on roles and responsibilities will reflect our current evolving progress towards a more aligned and fully integrated system. A key component would include using the WorkSource Rogue Valley Centers as the foundational base for an integrated, seamless service delivery system, allowing/encouraging other workforce system partners to refer customers to these services and add specific program/service enhancements (e.g., case managements, support services, enhanced training investments, etc.) through a collaborative and integrated program design / management process.
- We plan to use the RSA template tool being developed by state-level partners. We will Identify shared resource investments and apply appropriate cost allocation methodologies among participating and/or mandatory partners.

E. Describe how one-stop centers are implementing and transitioning to an integrated technology-enabled intake and case management information system for core programs and programs carried out by one-stop partners [WIOA Sec. 108(b)(21)]

WorkSource Rogue Valley uses a technology enabled enrollment system. Through the state-developed WorkSource Oregon Management Information System (WOMIS), various program eligibility can be determined. This information is then auto populated in the I-Trac system, which documents and verifies eligibility for WIOA

funding streams and discretionary grants. One-Stop partners are able to access both WOMIS and I-Trac to effectively serve individuals. We also anticipate rollout of Surface Pro tablets to quickly check-in and provide service to customers at the WorkSource Rogue Valley centers in the coming months.

4.6 Consistent with the Guidance Letter on Minimum Training Expenditures, describe how the board plans to implement the occupational skill development expenditure minimum.

Clearly state whether the local board will:

A. Expend a minimum 25% of WIOA funding under the local board's direct control on occupational skill development.

OR

B. Use an alternative formula that includes other income beyond WIOA funding to meet the minimum 25% expenditure minimum. Provide a description of other income it would like to include in calculating the expenditure minimum.

RWP has not yet determined which formula option it will use to meet the Minimum Training Expenditures requirement. We plan to analyze the two options in the coming months, make a final determination, and communicate our decision to the state by the July 1, 2016 effective date. We will structure our service provider contract so that the contractual budgeted amounts will meet this 25% minimum expenditure requirement.

4.7 Describe the process and criteria for issuing individual training accounts. [WIOA Sec. 108(b)(19)]

Please see the Rogue Workforce Partnership's Individual Training Account Policy Attachment #10 for more information regarding the process and required criteria.

4.8 If training contracts are used, describe processes utilized by the local board to ensure customer choice in the selection of training programs, regardless of how the training services are to be provided. See Local Plan References and Resources. [WIOA Sec. 108(b)(19)]

Most customers who pursue training complete the Foundational Skills Workshops (FSW), and all customers complete an Individualized Employment Plan (IEP) in consultation with a Talent Development Specialist. During the FSW, all customers complete "Training Options," a workshop designed for customers to think through the return on investment for the training path that they wish to pursue, as well as to become aware of the training providers who are on the local Eligible Training Provider List and resources (beyond WIOA) that can support their employment goals. On-the-Job Training, Occupational Skills Training, and Incumbent Worker Training are supported locally. Please see the Rogue Workforce Partnership's Individual Training Account (Attachment #10), On-the-Job Training (Attachment #11), and Incumbent Worker Training (Attachment #12) Policies for more information regarding the process and required criteria.

4.9 Describe process utilized by the local board to ensure that training provided is linked to in-demand industry sectors or occupations in the local area, or in another area to which a participant is willing to relocate. [WIOA Sec. 134(c)(3)(G)(iii)]

Please see the Rogue Workforce Partnership's Individual Training Account, On-the-Job Training, and Incumbent Worker Training Policies (Attachments #10, #11, & #12) for more information.

4.10 Describe how rapid response activities are coordinated and carried out in the local area. See Local Plan References and Resources. [WIOA Sec. 108(b)(8)]

The Local Workforce Board acts as a conduit for businesses and funding sources for businesses that find themselves in need of Rapid Response activities. As part of the WIOA program contract, the Board has contracted for rapid response from the current program provider. Rapid response is a service delivered to Rogue Valley businesses that have provided notification of a lay-off or closure. Services vary depending on the type of lay-off, the number of individuals affected, and the time made available to deliver services.

The following describes the sequence of Pre-Layoff/Rapid Response activities that may be provided:

1. Initial Notification of Layoff or Closure: The pre-layoff process begins when the Dislocated Worker Unit local or state liaison receives a formal WARN notice or similar information through informal channels (e.g., a phone call or newspaper article). State and local DW Staff will make contact and share information of layoff/closure via phone or email with state and/or local partners, **including the State Labor Liaison, if it becomes known that there is a collective bargaining agreement in place.**
2. Initial On-Site Meeting with Company Representative and Worker Representative: The goal is to complete the investigation and be onsite with the company within 48 hours, where practical.
3. Transition Team: If time allows and staff are notified prior to the lay-off or closure, a transition team should be established to assist in the delivery of re-employment/transitional services. The transition team should be comprised of:
 - Employer representative(s)
 - Employee representative(s)
 - Local and/or State Liaison(s)
 - Union representative and/or Labor Liaison (if applicable)
4. Rapid Response Team members include:
 - WorkSource Rogue Valley
 - WIOA Adult & Dislocated Worker Service Provider (ResCare)
 - Oregon Employment Department
 - OED - Trade Adjustment Act Unit (state & local)
 - Consumer Credit Counseling
 - Oregon Department of Human Services
 - Oregon Health Insurance Marketplace
 - Union representative and/or State Labor Liaison (if applicable)
 - Other partners as needed
5. Employee Survey: A survey of the workers is conducted to obtain their direct input concerning the types of services they would like to see made available.
6. Employee Information session: Ideally, members of the Local DW and/or the State DW Unit coordinate these sessions at the worksite. **When there is a union involvement, partners will coordinate with the State Labor Liaison to secure locations for the information sessions.**
7. Pre-Layoff Services Planning: Information gathered from employees, company management, and the union (if applicable) will determine the plan for services to affected workers.
8. Employer Feedback: Follow up

Section 5: Compliance

Please answer the following questions of Section 5 in 12 pages or less. Most of the response should be staff-driven responses as each are focused on the organization's compliance with federal or state requirements.

5.1 Describe the process for neutral brokerage of adult, dislocated worker, and youth services. Identify the competitive process and criteria (such as targeted services, leverage of funds, etc.) used to award funds to sub-recipients/contractors of WIOA Title I Adult, Dislocated Worker, and Youth services, state the names of contracted organizations, and the duration of each contract. [WIOA Sec. 108(b)(16)]

► **WorkSource Rogue Valley**

RWP co-created a joint competitive procurement process in early 2015 with the Oregon Department of Human Services for integrated services at the WorkSource Rogue Valley Centers. This Request for Proposal and service provider selection was finalized and services began July 2015 with the new provider, ResCare Workforce Services. A single joint RFP was issued, and two separate contracts were executed: one for RWP-funded services, and the other for DHS-funded services (TANF-JOBS, SNAP-OFFSET). Both of these initial contracts are for one year, with the option to renew for a second year, and then two subsequent two year renewals – for a total of six years. Procurement would therefore occur again in 2021. See Attachment #13 for the evaluation and criteria used in the selection process.

Since July 2015, workforce services through the following funding streams have been provided by ResCare:

- WIOA Title I Adult, Dislocated Worker, and Out-of-School Youth services
- Department of Human Services TANF-JOBS and SNAP-OFFSET employment and training services
- Back-to-Work Oregon program - State General Funds via the Office of Community Colleges & Workforce Development
- Other federal or state funded grants:
 - U.S. Department of Labor Job Driven National Emergency Grant
 - U.S. Department of Labor Re-Thinking Job Search
 - U.S. Department of Health & Human Services - Health Profession Occupations Grant / (aka SOHOPE), via grant received by Rogue Community College
 - REACH - Rogue Valley TANF/ERDC Education Pilot Project – State General funds transmitted through Oregon DHS

► **WIOA In-School Youth Services**

WIA/WIOA In-School Services were competitively procured in 2013. College Dreams, a local non-profit organization, is the current In-School Youth contracted service provider. This is an annual contract with four 1-year options for renewal through June 2017. These services will be competitively procured again at that time.

5.2 Provide an organization chart as Attachment A that depicts a clear separation of duties between the board and service provision.

See Attachment A

5.3 Provide the completed Local Board Membership Roster form included in Oregon draft policy WIOA 107(b) – Local Board Membership Criteria as Attachment B. See Local Plan References and Resources.

See Attachment B

5.4 Provide the policy and process for nomination and appointment of board members demonstrating compliance with Oregon draft policy WIOA 107(b) – Local Board Membership Criteria as Attachment C.

See Attachment C

5.5 Provide the completed Local Workforce Development Board Certification Request form included in Oregon draft policy WIOA 107(c) – Appointment and Certification of Local Workforce Development Board as Attachment D. See Local Plan References and Resources.

See Attachment D

5.6 Provide the name, organization, and contact information of the designated equal opportunity officer for WIOA within the local area.

Sherri Emitte, Director of Administration – Rogue Workforce Partnership – 100 E. Main St., Suite A Medford, OR 97501 – 541-842-2530 – sherrie@jobcouncil.org

5.7 Identify the entity responsible for the disbursement of grant funds. See Local Plan References and Resources. [WIOA Sec. 108(b)(15)]

Rogue Workforce Partnership has been designated by the Local Chief Elected Official as the local grant recipient and administrative entity. See Attachment #14 for the Partnership Agreement between the Rogue Workforce Partnership and the Rogue Valley Workforce Consortium

5.8 Indicate the negotiated local levels of performance for the federal measures. [WIOA Sec. 108(b)(17)]

RWP will propose performance targets when more information is available from the Department of Labor and CCWD regarding how WIOA performance will be calculated.

5.9 Describe indicators used by the local board to measure performance and effectiveness of the local fiscal agent (where appropriate), contracted service providers and the one-stop delivery system, in the local area. [WIOA Sec. 108(b)(17)]

RWP uses its contractor quality assurance monitoring guide, Operational Standards checklist and I-Trac reports to measure performance and effectiveness of contractors. RWP works closely with LLT partners to identify what's working well, what needs attention, and what is missing from the one-stop delivery system. LLT will develop a tracking tool to assist with this effort and share results with local board on a quarterly basis.

5.10 Provide a description of the replicated cooperative agreements, as defined by WIOA 107(d)(11), in place between the local board and the Department of Human Services' Office of Vocational Rehabilitation Services with respect to efforts that will enhance the provision of services to individuals with disabilities and to other individuals, such as cross training of staff, technical assistance, use and sharing of information, cooperative efforts with employers, and other efforts at cooperation, collaboration, and coordination. See Local Plan References and Resources. [WIOA Sec. 108(b)(14)]

RWP is awaiting cooperative agreements and guidance from the State before moving forward with local cooperative agreements.

5.11 Describe the process for getting input into the development of the local plan in compliance with WIOA section 108(d) and providing public comment opportunity prior to submission. Be sure to address how members of the public, including representatives of business, labor organizations, and education were given an opportunity to provide comments on the local plans. If any comments received that represent disagreement with the plan were received, please include those comments here. See Local Plan References and Resources. [WIOA Sec. 108(b)(14)]

Amid the planning process for the publication of the Strategic Plan, the RWP utilized different data collection strategies to solicit feedback from key stakeholders including: businesses, labor organizations, educators, jobseekers, current contractor staff, and workforce system partners regarding service delivery. Feedback was collected via surveys and focus groups with questions targeting distinct stakeholder groups. This included:

1. Feedback and guidance from large business and community partner forums held in 2015 were incorporated into the local plan.
2. Sector Strategy industry leaders were engaged to gain their input and guidance.
3. Current customers who have been working with one-stop staff for two months (or longer), and for some reason have not moved forward with their employment goals. The purpose for engaging this group's opinions and perspective was to identify what services that are currently being offered work well, offer most value, and which do not. The questions addressed what originally brought them into the one-stop center, and whether they feel like their needs were met, or not met, by our services and our staff. Additionally, the question of how we can better serve our community was asked as well.
4. Current customers who recently completed the Foundational Skills Workshops (FSW) program and are actively engaged. The purpose of targeting this group was to identify what workshops were most valuable, least valuable, and what we could do to improve overall career services.
5. Current contractor staff who teach the FSW and provide additional career and training services to one-stop customers. The purpose of enlisting this group's opinion was to gain staff perspective on what seems to be working well (and not so well) and to overlay the opinions with customer opinions to identify where we can improve, refine, discontinue, or innovate the current service delivery model.
6. Workforce and Higher Education System Partners (WHESP) were engaged to gain their input and guidance. For membership representation, see Section 3.3

The local plan was posted on the RWP website on February 29, 2016 to allow for the required 30-day comment period. Media releases and public comment opportunity notices were posted through web-posting, a broad email invitation to community partners and stakeholders, and newspaper advertisements.

RWP members will devote their March quarterly meeting to local plan development and refinement. This includes an opportunity to provide comments on the plan from members of the public, including representatives of business, labor organizations, education and the community. The 39-person RWP membership also has - by design and intention - very strong representation from business, labor, education and community partners. These partners bring together their broad community perspectives to craft, review and refine the local plan.

5.12 State any concerns the board has with ensuring the compliance components listed below are in place prior to July 1, 2016. Copies of documents are not required at this time but may be requested during monitoring.

- Administration of funds
- Agreement between all counties and other local governments, if applicable, establishing the consortium of local elected officials
- Agreement between the Local Elected Officials and the Workforce Development Board

- Local Workforce Development Board Bylaws
- Code of Conduct
- Approved Budget
- Memorandum of Understanding and/or Resource Sharing Agreements, as applicable
- Required policies on the following topics
 - Financial Management including cost allocation plan, internal controls, cash management, receipts of goods, cost reimbursement, inventory and equipment, program income, travel reimbursement, audit requirements and resolution, annual report, property management, debt collection, procurement, allowable costs
 - Program Management including equal opportunity for customers, supportive services, needs related payments, file management, eligibility, self-sufficiency criteria, individual training accounts, layoff assistance, priority of services, grievance for eligible training providers list, transitional jobs, stipends, training verification/refunds,
 - Risk Management including records retention and public access, public records requests, monitoring, grievance, incident, disaster recovery plan
 - Board Policies including board appointment, board resolutions, conflict of interest
 - Human Resources including employee classification, benefits, holidays and PTO, recruitment and selection, employee development, discipline, layoffs, terminations, and severance, drug policy, sexual harassment, equal opportunity/non-discrimination
- Professional Services Contract for Staffing/Payroll Services, if applicable
- Contract for I-Trac Data Management System

RWP does not have any concerns at this time.

5.13 Provide the completed copies of the following local board approval forms:

- State of Concurrence
- Partner Statement of Agreement
- Assurances

WIOA compliant versions of these documents will be posted in the near future.

Awaiting the State's guidance