

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.

| 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

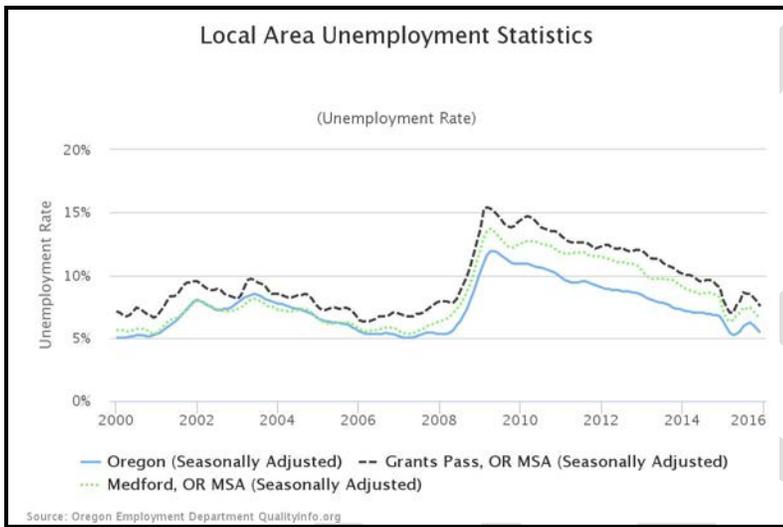
| Top 35 Skills Required In Occupations in Rogue Valley | |
|---|---------------------------------|
| Skill | Total Openings 2012-2022 |
| use basic mathematics | 21875 |
| process records and maintain forms and files | 21593 |
| work as a team member | 18930 |
| provide customer service | 16787 |
| 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 5 percent of expected job openings will require an associate degree, 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 15 percent of the expected openings will require one. 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, while about 36 percent of total job openings don't require a high school diploma as a minimum level of education. While the skills requirements don't necessarily indicate that level of education is needed, many employers will require that as a minimum to qualify for those jobs. Likewise, 34 percent of future occupational openings 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.

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, in conjunction with the Wagner-Peyser (WP) Employment Services (ES), 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.

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:
 - 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

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

- ▶ 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;
 - ▶ 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).

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

- 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 is supported through a robust Eligible Training Provider List (ETPL), comprised of entities with a proven capability of securing quality employment outcomes for participants. WIOA also provides enhanced access and flexibility for work-based training options, such as Registered Apprenticeship (RA), on-the-job training, customized training, and incumbent worker training:⁶

- Individual Training Account (ITA): A financial obligation of WIOA funds made by WorkSource program 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, fees (school, lab, etc.), and books required for the training program.
- Occupational Skills Training: Training which utilizes the ETPL or allowable exception policies, 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).
- 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).

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

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

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

| 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 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 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.

We are fortunate to have two very exciting programs starting in our region this program year which will greatly leverage our limited WIOA funds.

1. Southern Oregon HOPE is a federal Health Professions Opportunity Grant through the U.S. Department of Health & Human Services, offering short term occupational training in 17 healthcare options. It is available to low-income residents who are within 185% of the federal poverty level.
2. REACH Project is a similar short-term training program offering training opportunities in other sectors or industries with labor market data justifying training in our region. REACH participants must either be on public assistance from Department of Human Services - specifically, receiving Temporary Assistance for Needy Families (TANF) and/or Employment Related Day Care (ERDC) Assistance.

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 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.
- Use data to drive effort and outcomes.

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.
- 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 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.
- ▶ Continue to partner, leverage and pursue additional resources for our local youth partnership initiatives:
 - **College & Careers 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.
 - **Southern Oregon Success** - Our region’s cradle-to-career, “Collective Impact”⁷, Regional Achievement Collaborative⁸ 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-based⁹ system of services/supports to help all youth overcome life obstacles and achieve academic and career success.
- ▶ Spearhead Career-Related learning Experience (CRLE) partnerships to increase exposure to job and career opportunities and better connect school to work.
- ▶ 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.

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:

⁷ See Stanford Social Innovation Review, Winter 2011: http://ssir.org/articles/entry/collective_impact

⁸ See Oregon Chief Education Office: <http://education.oregon.gov/regional-achievement-collaboratives/>

⁹ 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>

- 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 be 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.

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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 design¹⁰ 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.
- **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.

¹⁰ 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 Steering Committee was established as a sector strategy 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 OFSET 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 offices 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 DW 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 or local partners.
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:
 - o Employer representative(s)
 - o Employee representative(s)
 - o Local and/or State Liaison(s)
 - o Union representative and/or Labor Liaison (if applicable)
4. 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.
5. Employee Information session: Ideally, members of the Local DW and/or the State DW Unit coordinate these sessions at the worksite.
6. Pre-Layoff Services Planning: Information gathered from employees, company management, and the union (if applicable) will determine the plan for services to affected workers.
7. 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



Rogue Valley Economic Conditions Report

by [Guy Tauer](#)

February 24, 2016

The Rogue Valley, the area served by the Rogue Workforce Partnership, includes Jackson and Josephine counties. Jackson County is bordered by Klamath County to the east and Josephine to its adjacent west. Josephine sits between Curry and Jackson County, with Interstate 5 the main north-south transportation corridor. Douglas County is north of the Rogue Valley counties. Forested or rolling hills and valleys dotted with small farms, ranches and a many new wineries dot the landscape of this Mediterranean Sub-tropical climate zone, which is characterized by winter rains and summer drought. Medford is the most populous city in Jackson County at 77,665 (7/1/15 est.), while Grants Pass (36,465) is the largest city in the Josephine County. Although most of the Rogue Valley is mix of river valleys with fertile soil and temperate oak, pine and Douglas fir dominated forest on low, but steep, mountains, most of its people live along the main transportation corridors of Hwy. 99, 62 and I-5.

Portland State University's Population Research Center recently released their preliminary population estimates for July 1, 2015. These newly calculated figures show that the Rogue Valley population is growing, and the pace has picked up over the past couple of years. As new home construction has climbed only slightly since its recession low point, rising home prices and low vacancy rates for rental dwellings are evidence of more people chasing homes for sale and available rental housing units. Data compiled and published by Roy Wright Appraisal Service show Jackson County urban home sales and prices rising, while inventory is lower, compared with year-to-date figures through October 2014.

Jackson County's population continued to grow over the past five years, with the pace picking up during the past three years. The most recent estimates from Portland State University show Jackson County's population growing by 2,600 between July 1, 2014 and July 1, 2015, for a growth rate of 1.2 percent – about the same pace as Oregon's overall increase. Medford grew at a slightly faster pace than the county average, up by 1.3 percent over the year, to reach 77,655. Medford is the eighth most populous city in Oregon, just below Bend, which has 81,310 residents. During the past 15 years, Jackson County's population grew by nearly 30,000. Ashland has just over 20,000 residents, at the South end of Jackson County. Central Point is just north of Medford, and has about 17,000 residents. Along Hwy 62, traveling northeast from Medford, the smaller towns of Eagle Point, and Shady Cove have about 8,600 and 3,000 residents, respectively. Between Medford and Ashland, the cities of Talent (6,230) and Phoenix (4,580) sit along hwy. 99. An additional 64,905 people live in unincorporated areas of Jackson County.

Josephine County's population changed little between 2000 and 2013, adding just 40 residents. Over the subsequent two years, the county added almost 1,000 new residents. From July 1, 2014 to July 1, 2015, Josephine County's total population rose from 83,105 to 83,720, for an increase of 0.7 percent. Grants Pass population was estimated at 36,465 in 2015, a substantial increase of about 1,400 from the July 1, 2014 figure. According to PSU's Population Research Center, this 4.0 percent gain was mostly due to annexation, not a result of a large influx of new

people relocating to Grants Pass. Between 2000 and July 1, 2015, Josephine County's total population increased by about 8,000. The only other incorporated city in the county is Cave Junction, with just over 1,900 residents. According to recent estimates a majority of the Josephine County's residents live in unincorporated areas, just over 46,000.

Resources

The industries in the Rogue Valley are strongly influenced by history, geography, and demography. The intrinsic beauty of the Rogue Valley, coupled with natural resources from agriculture with pears and more recently grapes, boutique wineries and long-standing dependence on timber and forest products have historically defined the region. Many retail establishments from sole proprietors to large, nationally renowned companies call the Rogue Valley home. The region serves as hub of trade and service businesses, serving a larger population base than just its own residents. Tourism and travel-related businesses have expanded and prospered with amenities such as the Oregon Shakespeare Festival, Crater Lake National Park, the Oregon Caves National Monument, the Rogue River and many outdoor recreational activities, which draw visitors from other counties, states and to a lesser extent, from other countries too.

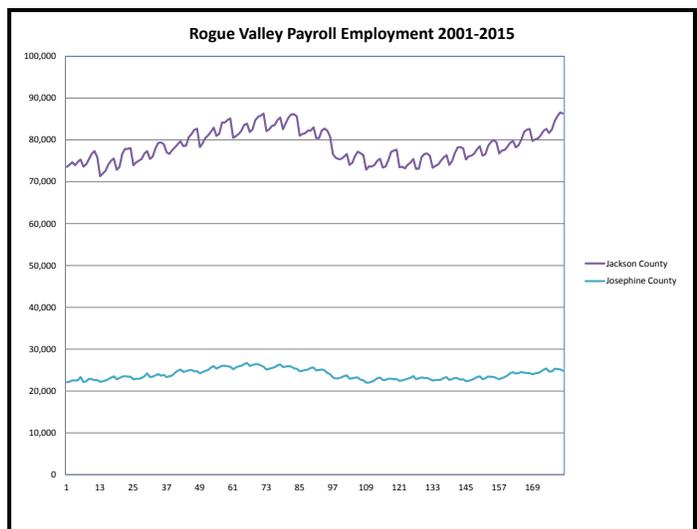
In 2014, travel spending in Jackson County increased by 2.5 percent from the prior year, while travel employment increased by 3.5 percent. Employment plummeted steeply in Jackson County from 2008 to 2010, during the throes of the Great Recession. Since that time, employment has risen modestly and was up by 540 jobs or 12 percent, while total travel spending increased by the same rate to reach \$506.3 million.

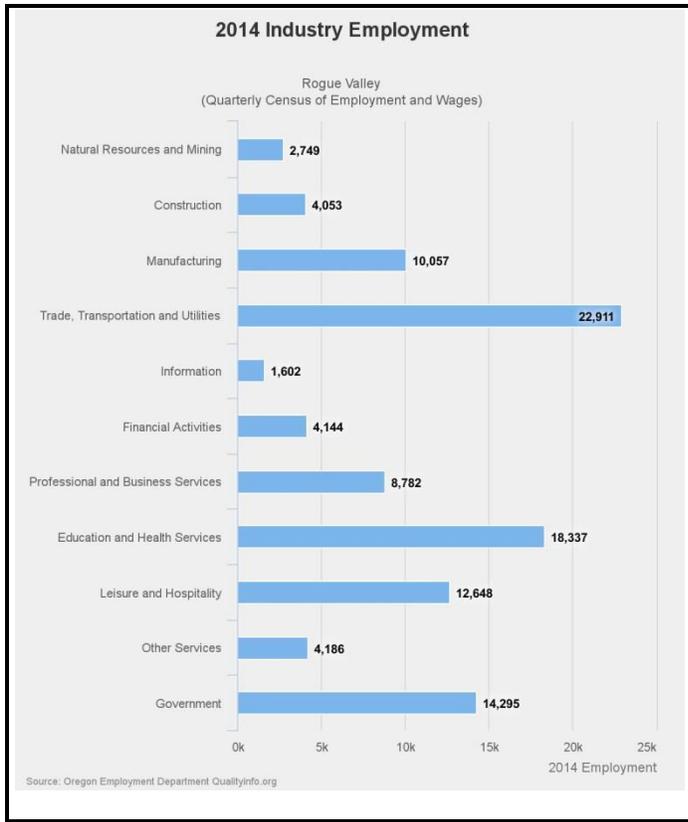
Josephine County travel spending slipped by 1.2 percent from 2013 to 2014 to reach \$123.9 million. Travel-generated employment increased by 60 jobs, or 3.7 percent between 2013 and 2014. Total travel spending in Josephine County increased by 35 percent from 2001 to 2014. Over that same period in Jackson County, travel spending rose by 64 percent.

Population growth, in-migration by older residents, and a generally aging population have increase employment in the health care and social assistance industries over time. People seeking health care treatment from Northern California to the Coast travel to the Rogue Valley for medical care.

Economy

The economy of the Rogue Valley supports about 111,150 payroll jobs, not counting self-employed people and most agricultural jobs. The region lost about 13,240 jobs in the Great Recession, or a decline of 11.8 percent by December 2009. From 2009 through December 2015, the area has regained about 93 percent, or 12,260 of the jobs lost during and shortly after the Great Recession.



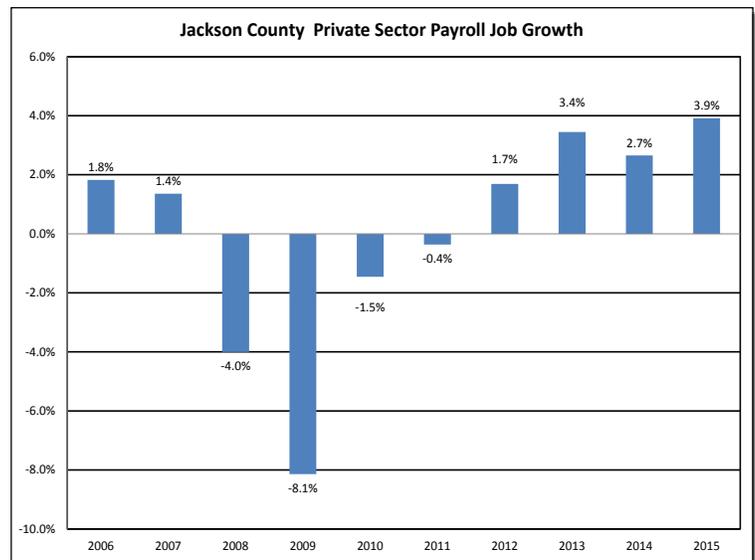


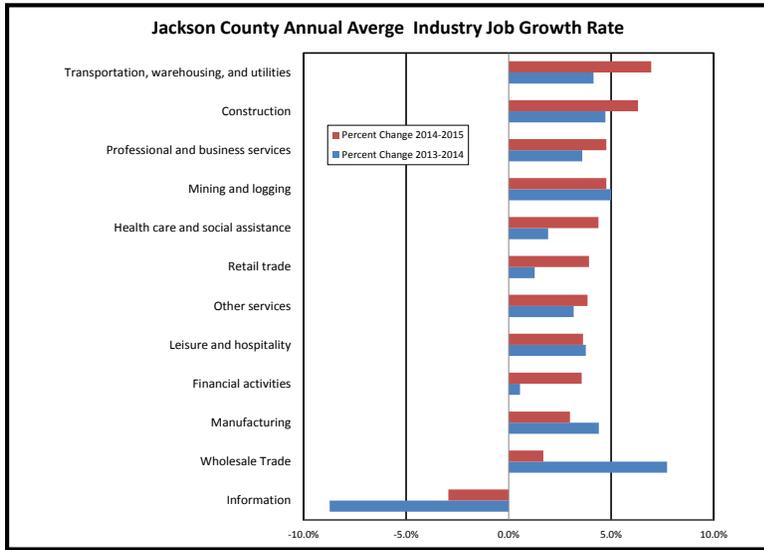
Recall that statewide, Oregon had regained all the jobs lost in the recession in November of 2014.

The [Oregon Blue Book](#) (a fact book produced by the Secretary of State's Office) lists the top economic drivers for Jackson County: Medical, retail, tourism, agriculture, manufacturing and forest products. Top economic industries in Josephine County, according to the Blue Book, are; Tourism, recreation, forest products, electronics and software. The Rogue Valley had nearly 2,000 jobs in high-tech in 2014, a small but faster-growing and higher-wage group of industries. The graph to the left shows the two-county area's top employing industries.

Looking Back at 2015- Job Growth by Industry in the Rogue Valley

With 2015 now on the books, this is a good time to take a look at what industries contributed to the area's job growth. It's been a long slog to regain the jobs lost during the Great Recession, but Josephine County has been making progress, especially over the past two years. Jackson County isn't quite back to pre-recession totals. On an annual average basis, December 2015 payroll employment is just a notch above the previous December peak employment in 2006. Josephine County has gained back about 2,000 jobs that evaporated during the Great Recession and its aftermath. As of December, Josephine County is still about 1,000 jobs below the housing-boom era peak employment numbers.





Jackson County has added jobs steadily during the past four years. The fastest private-sector growth rate over that time was in 2015, with nearly a 4 percent increase. During the great recession, the largest annual job loss occurred in 2009, with a painful 8.1 percent decline (See previous graph).

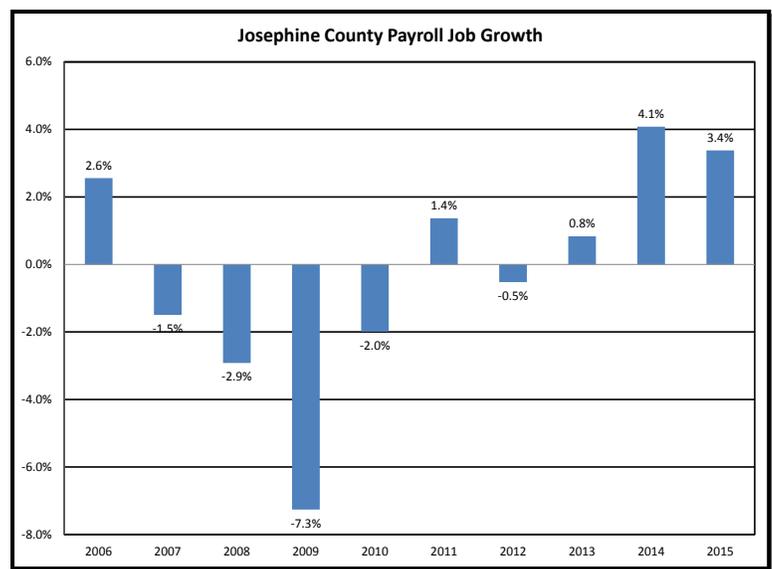
Jackson County’s job trends continue to look positive as we begin 2016. Although nothing in the future is certain, seeing many sectors adding jobs in 2015 shows a broad-based recovery. This diversified

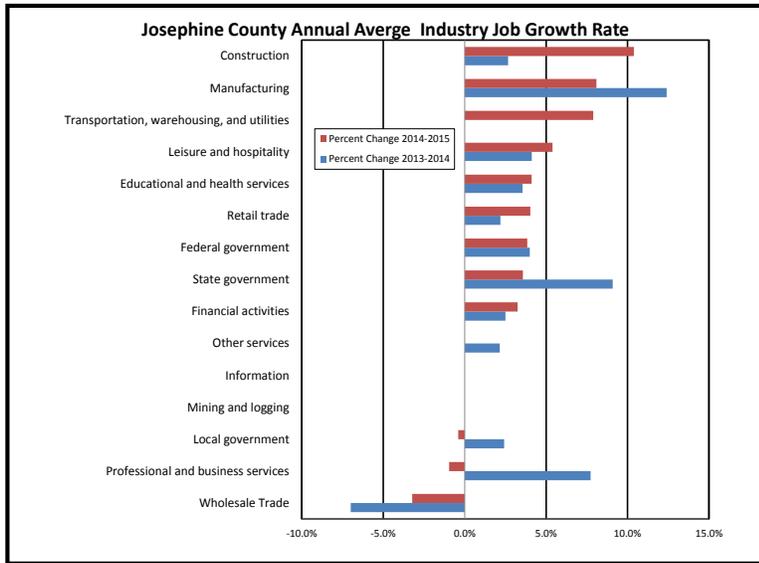
expansion bodes well to insulate the Rogue Valley from the next soft-patch or downturn in the economy.

Jackson County’s fastest growing industries in 2015 were transportation, warehousing and utilities, and construction, all growing by over 5 percent, each adding about 200 jobs. Mining and logging was also faster growing, but since that is such a small industry now, only added 20 jobs in 2015. Retail trade, and health care and social assistance were both fast growing and added about 500 and 600 jobs in 2015, respectively. Manufacturing employment grew slightly slower than the all-industry average, but still added over 200 jobs in Jackson County last year. The only broad industry with a decline in 2015 was information, falling about 3 percent, or losing 40 jobs from 2014. Information also shed jobs in 2014 (See above graph).

Josephine County Playing Catch Up from Great Recession Losses

Neighboring Josephine County was also hammered by the Great Recession, losing jobs five out six years between 2007 and 2012. The steepest decline occurred in 2009 with a 7.3 percent drop in payroll employment. The county’s fortune began to turn around in 2013 when payroll employment rose by just less than 1 percent. Over the past two years, job growth has been stronger with nearly all broad industries adding jobs. It has taken a while, but overall job market conditions are markedly better than they have been in a decade in Josephine County (See graph to the right).





As seen in the graph to the left, Construction had the fastest job growth rate in 2015, up by about 10 percent. That fast growth only represented 80 new jobs in the county, as that industry was so hollowed and hasn't seen much recovery from its recessionary low point.

Manufacturing grew by about 8 percent in 2015, or up by 220 jobs, following a 12.4 percent rise in 2014.

Retail trade, private educational and health services, and leisure and hospitality all posted solid

growth rates in 2014 and 2015. Over the past year, those industries added nearly 500 jobs combined to the Josephine's payroll employment total. Wholesale trade, local government, and professional and business services all saw slight job loss in 2015, but the total for those three amounted to only 60 jobs lost. Wholesale trade is the soft underbelly in Josephine County's job market lately, losing employment during each of the past four years and not matching the overall recovery the broader job market has experienced. Information, as well as mining and logging, have just been languishing in the doldrums the past couple of years, with job totals flat in both 2014 and 2015.

Employer Needs

Jackson and Josephine counties (Rogue Valley) will add more than 13,000 jobs from 2012 to 2022, according to projections from the Oregon Employment Department. This represents a 13 percent increase in employment over 10 years. The growth stems from anticipated private-sector gains of 12,040 jobs (14%) and the addition of 1,030 jobs (7%) in government. This projected 13 percent growth rate exceeds the 2.7 percent growth seen during the past decade.

Of course, these are just projections, and no one can know with certainty what the future holds. But these are our educated guesses about future employment growth in the Rogue Valley. If you look back at prior projections, we certainly didn't forecast employment to only grow by 2.7 percent from 2002 to 2012. At the time we had forecast employment growth over the decade at 15.6 percent. So those past trends and projections

| | 2012 | 2022 | Change | % Change |
|--|---------|---------|--------|----------|
| Total payroll employment | 100,010 | 113,080 | 13,070 | 13% |
| Total private | 85,140 | 97,180 | 12,040 | 14% |
| Natural resources and mining | 2,700 | 3,000 | 300 | 11% |
| Mining and logging | 420 | 470 | 50 | 12% |
| Construction | 3,500 | 4,160 | 660 | 19% |
| Manufacturing | 9,030 | 9,890 | 860 | 10% |
| Durable goods | 6,050 | 6,720 | 670 | 11% |
| Wood product manufacturing | 2,210 | 2,440 | 230 | 10% |
| Trade, transportation, and utilities | 22,070 | 24,380 | 2,310 | 10% |
| Wholesale trade | 3,090 | 3,370 | 280 | 9% |
| Retail trade | 15,900 | 17,560 | 1,660 | 10% |
| Transportation, warehousing, and utilities | 3,080 | 3,450 | 370 | 12% |
| Information | 1,900 | 1,880 | -20 | -1% |
| Financial activities | 4,970 | 5,500 | 530 | 11% |
| Professional and business services | 8,370 | 9,920 | 1,550 | 19% |
| Private educational and health services | 17,540 | 21,290 | 3,750 | 21% |
| Private educational services | 860 | 940 | 80 | 9% |
| Health care and social assistance | 16,680 | 20,350 | 3,670 | 22% |
| Health care | 14,790 | 18,180 | 3,390 | 23% |
| Leisure and hospitality | 11,660 | 13,470 | 1,810 | 16% |
| Accommodation and food services | 10,010 | 11,600 | 1,590 | 16% |
| Other services | 3,400 | 3,690 | 290 | 9% |
| Government | 14,870 | 15,900 | 1,030 | 7% |
| Federal government | 1,950 | 1,830 | -120 | -6% |
| State government | 3,670 | 3,940 | 270 | 7% |
| State education | 1,370 | 1,500 | 130 | 9% |
| Local government | 9,250 | 10,130 | 880 | 10% |
| Local education | 5,640 | 6,270 | 630 | 11% |

clearly did not pan out. The Great Recession left those previous projections in ruins.

Beyond gains from economic growth, nearly 23,700 job openings will be created by 2022 as workers change occupations or leave for other reasons, such as retirement.

The 2012 to 2022 employment projections bring together several trends that have been building over the past few years: a growing health care sector, due in part to an aging population; continuing recovery from the Great Recession, particularly for the construction industry; and continuing baby boomer retirements.

There will be job opportunities in nearly all of the broad private-sector industry groups. All but information are expected to add jobs by 2022.

The Rogue Valley's health care and social assistance sector – which consists of ambulatory health care services, hospitals, nursing and other residential care facilities – is projected to add the most jobs (3,670) and also have the fastest growth rate (22%), followed by trade, transportation, and utilities (2,310).

The Rogue Valley's construction industry, continuing its recovery from massive job losses, is projected to grow at the second-fastest rate of any industry (19% or 660 jobs). Even with its relatively fast growth rate, the construction industry's employment will not return to the level seen prior to the Great Recession. This shows how much of a bubble there really was in construction and housing-related employment during the employment ramp-up prior to the Great Recession and the housing bubble bursting.

So far, we haven't seen much of that 19 percent growth. But projected population growth and future in-migration will eventually cause resumption of a more vigorous construction and housing market in the Rogue Valley. Older housing stock will eventually need remodeling or replacement, creating demand for construction employment. Other industries expected to fall short of pre-recession employment levels by 2022 include trade, transportation, and utilities; financial activities; and information.

Information – which includes newspaper, directory, and book publishers, as well as software publishing and other firms – will be the region's slowest-growing private sector industry (-1%), while federal government is expected to show the largest public sector decline (-6%).

From 2012 to 2022, there will be job openings in almost all occupations. Rogue Valley's economic diversity is characterized by the two very different occupational categories projected to have the most job openings: service (8,435 openings) and office and administrative support (5,554 openings). Service occupations – which include jobs as varied as emergency services, pest control workers, and fast food cooks – generally pay lower wages and require lower levels of education. Professional occupations – which include web developers, engineers, and lawyers – are expected to have 4,310 openings. This occupational group tends to pay higher wages and require higher levels of education. Health care occupations tend to be the ones growing fastest, driven in large part by the aging and growing population. The top five fastest-growing large occupations are food servers, non-restaurant; personal care aides; home health aides; computer-controlled machine tool operators; and medical secretaries.

In terms of actual job counts, retail salespersons, food preparation and serving workers, waiters and waitresses, cashiers, and registered nurses are the five occupations with the most job openings anticipated in the coming 10 years. These are all large occupations, and they will all experience some openings due to economic growth and many more due to the retirement or other departure of existing workers.

In addition to the 13,220 new jobs from businesses opening or expanding, Rogue Valley employers will also need sufficiently-trained workers for the 23,690 openings due to the need to replace those leaving occupations. With the exception of construction and health care occupations, replacement openings will make up a majority of total job openings in all major occupational groups.

One-third of job openings typically require education beyond high school for entry into the occupation. About half (51%) of the projected job openings will require some sort of education beyond high school in order for candidates to be more competitive in the hiring process. A bachelor's degree or higher will be needed for about 22 percent of the openings at the competitive level.

| Rogue Valley Occupational Employment Forecast 2012-2022 | | | | | | | |
|--|-------------------|-------------------|-------------------|-----------------|--------------------|-----------------|-----------------|
| | 2012 | 2022 | Employment | Growth | Replacement | Total | |
| | Employment | Employment | Change | Openings | Openings | Openings | Openings |
| Retail Salespersons | 3,682 | 4,115 | 433 | 433 | 1,259 | | 1,692 |
| Cashiers | 2,613 | 2,785 | 172 | 172 | 1,130 | | 1,302 |
| Combined Food Preparation and Serving Workers, Including Short-Order Cooks | 2,005 | 2,457 | 452 | 452 | 766 | | 1,218 |
| Waiters and Waitresses | 1,912 | 2,175 | 263 | 263 | 920 | | 1,183 |
| Registered Nurses | 2,316 | 2,701 | 385 | 385 | 449 | | 834 |
| Office Clerks, General | 2,164 | 2,315 | 151 | 151 | 455 | | 606 |
| Customer Service Representatives | 1,299 | 1,502 | 203 | 203 | 353 | | 556 |
| Medical Secretaries | 1,265 | 1,665 | 400 | 400 | 152 | | 552 |
| Laborers and Freight, Stock, and Material Movers | 1,113 | 1,250 | 137 | 137 | 345 | | 482 |
| Truck Drivers, Heavy and Tractor-Trailer | 1,535 | 1,770 | 235 | 235 | 245 | | 480 |
| Janitors and Cleaners, Except Maids and Home Health Aides | 1,336 | 1,519 | 183 | 183 | 251 | | 434 |
| Counter Attendants, Cafeteria, Food Concession, and Bartending | 646 | 673 | 27 | 27 | 394 | | 421 |
| Nursing Assistants | 1,088 | 1,298 | 210 | 210 | 207 | | 417 |
| General and Operations Managers | 1,261 | 1,424 | 163 | 163 | 236 | | 399 |
| Cooks, Restaurant | 905 | 1,126 | 221 | 221 | 178 | | 399 |
| Food Preparation Workers | 990 | 1,105 | 115 | 115 | 284 | | 399 |
| Supervisors and Managers of Retail Sales Workers | 1,152 | 1,296 | 144 | 144 | 251 | | 395 |
| Bookkeeping, Accounting, and Auditing Clerks | 1,758 | 1,992 | 234 | 234 | 161 | | 395 |
| Teacher Assistants | 1,153 | 1,271 | 118 | 118 | 262 | | 380 |
| Home Health Aides | 692 | 936 | 244 | 244 | 132 | | 376 |

**Jackson and Josephine Counties
Occupational Prioritization for Training
Top 20 High-Wage, High-Demand
Occupations¹**

| SOC Code | SOC Title | Total Openings 2012-2022 | Final Rank |
|-----------------|--|-------------------------------------|-----------------------|
| 29-1123 | Physical Therapists | 100 | 1 |
| 49-9041 | Industrial Machinery Mechanics | 97 | 2 |
| 11-9111 | Medical and Health Services Managers | 86 | 2 |
| 25-4031 | Library Technicians | 40 | 4 |
| 33-2011 | Firefighters | 132 | 5 |
| 13-2011 | Accountants and Auditors | 230 | 6 |
| 11-2022 | Sales Managers | 62 | 6 |
| 29-1171 | Nurse Practitioners | 49 | 6 |
| 29-1071 | Physician Assistants | 47 | 6 |
| 29-2011 | Medical and Clinical Laboratory Technologists | 45 | 6 |
| 11-2021 | Marketing Managers | 40 | 6 |
| 25-4021 | Librarians | 18 | 6 |
| 11-1021 | General and Operations Managers | 399 | 14 |
| 29-1060 | Physicians and Surgeons | 214 | 14 |
| 51-4121 | Welders, Cutters, Solderers, and Brazers | 94 | 14 |
| 11-9151 | Social and Community Service Managers | 63 | 14 |
| 41-4011 | Wholesale and Manufacturing Sales Representatives, Technical and Scientific Products | 62 | 14 |
| 51-7041 | Sawing Machine Setters, Operators, and Tenders, Wood | 47 | 14 |
| 49-9044 | Millwrights | 19 | 14 |
| 51-1011 | Supervisors and Managers of Production and Operating Workers | 103 | 23 |
| 51-9061 | Inspectors, Testers, Sorters, Samplers, and Weighers | 96 | 23 |
| 37-3013 | Tree Trimmers and Pruners | 64 | 23 |
| 49-9062 | Medical Equipment Repairers | 34 | 23 |
| 29-2012 | Medical and Clinical Laboratory Technicians | 29 | 23 |
| 31-2021 | Physical Therapist Assistants | 23 | 23 |
| 49-2098 | Security and Fire Alarm Systems Installers | 22 | 23 |

¹ Oregon Employment Department – Workforce and Economic Research Division, [Training Oregonians For The Right Jobs - A Method To Prioritize Occupational Training](#), (Salem, 2014), p23.



Spotlight on Rogue Valley Manufacturing: Recovery from Great Recession

by [Guy Tauer](#)

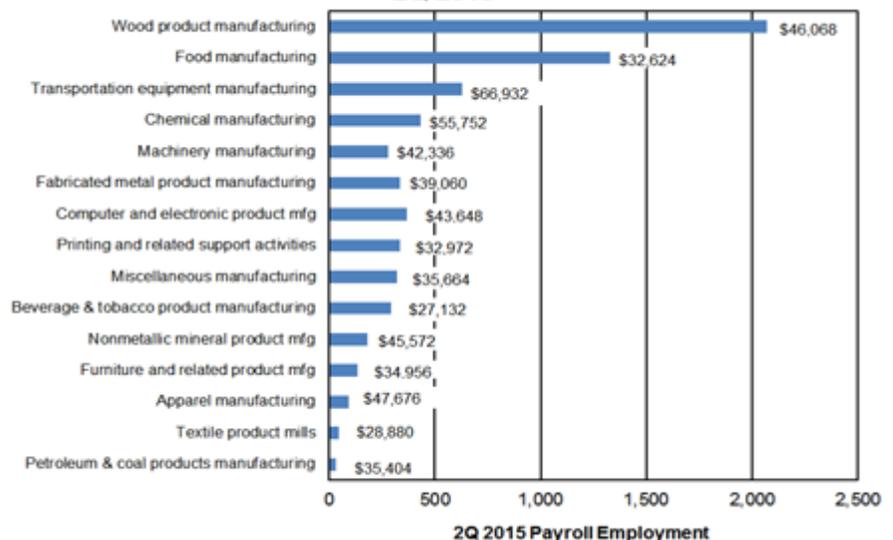
January 4, 2016

Manufacturing jobs are important to most economies. Many manufacturing businesses are considered "traded-sector," meaning that they sell their products outside the local area and thereby create new wealth for the communities where they are based. Not all local manufactured goods are sold or consumed outside the local area. I have personally consumed a few pints – not at one time – of locally manufactured microbrews from local manufacturers such as Caldera or Southern Oregon Brewing. But in general, manufacturers rely on exporting and selling their products beyond the local areas where they reside. Advanced manufacturing is one of the Rogue Workforce Partnership's – the local workforce investment board – targeted industry sectors. Southern Oregon Regional Economic Development also focuses on retaining and recruiting manufacturing companies as part of their mission to assist traded-sector businesses in the Rogue Valley.

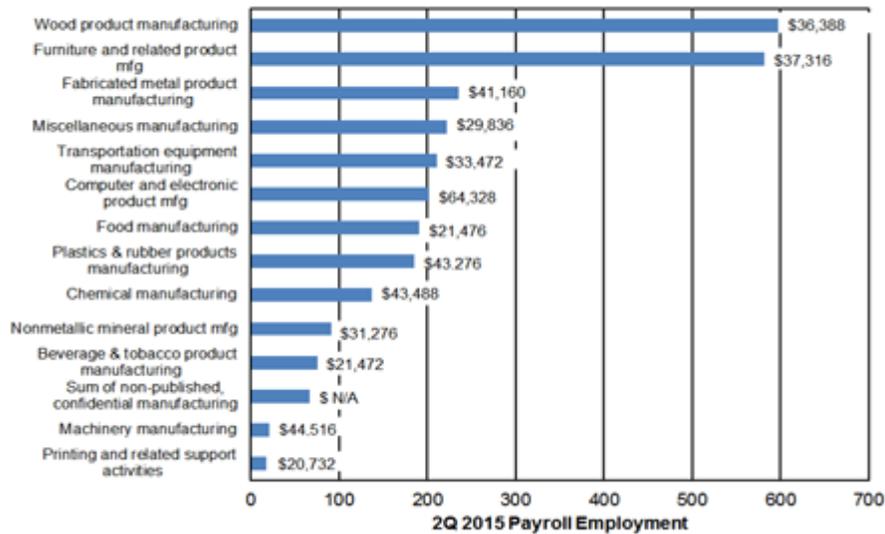
Another reason that manufacturers garner special treatment is wages can pay higher than average. In Jackson County, the average manufacturing wage per job was \$45,320 in 2014, compared with \$37,263 for the non-manufacturing average wage. In Josephine County, the average wage per job in manufacturing was \$38,338 in 2014 while the non-manufacturing wage per job was \$32,137.

Manufacturing jobs have been recovering steadily from the Great Recession in the Rogue Valley. In Jackson County, manufacturing pre-recession peak employment occurred in summer of 2007, at 7,910 jobs. During the recession, the county lost 1,970 jobs to reach 5,940 in January 2010. Since that time, manufacturing employment rose steadily to reach 7,800 jobs by November 2015. Manufacturing employment in Jackson County has recovered 95 percent of the jobs lost during the most recent recession.

**Jackson County Manufacturing Employment and Wages
2Q 2015**



Josephine County Manufacturing Employment and Wages 2Q 2015



Jackson County has a mix of higher- and lower-paying manufacturing industries. The most jobs are in fairly high-paying wood products manufacturing, while the second highest number of jobs are in food manufacturing with an average annual wage of \$32,624. Jackson County has many jobs in higher-paying chemical, transportation,

machinery, and computer/electronic products manufacturing industries.

The Great Recession also took a toll on Josephine County manufacturing jobs, and the recovery has not been as robust. Manufacturing's payroll employment pre-recession peak occurred in May 2006, when it stood at 3,600. By February 2010, the county lost 1,400 of those jobs as employment dipped to 2,200 in this "goods-producing" industry. Since that time, Josephine County added 780 jobs back in manufacturing. The county has regained 55 percent of the manufacturing jobs lost during the recession. Josephine County's mix of manufacturing jobs explains some of its struggles to regain all of those lost jobs. More of Josephine County's manufacturing jobs are tied to the housing and construction industries, which are still not back to their pre-recession levels. Josephine County has substantial employment in wood products and furniture manufacturing. These two industries account for more than 40 percent of Josephine's manufacturing employment. While these two housing-dependent sectors have yet to fully get back to their pre-recession levels employment, this has impacted the overall manufacturing recovery in the county. Computer and electronic product manufacturing is Josephine's highest-paying manufacturing industry, with average wage of \$64,328 and more than 200 jobs in second quarter 2015. The overall economy continues to expand and the housing market is tightening in many areas. This should lead to more construction activity and growing demand for Josephine County's manufactured goods, creating more opportunities and jobs going forward.



January 30, 2015

Exciting Southern Oregon Business Conference | January 29, 2015

2015 Southern Oregon Business Conference Featured Milken Institute Speaker and Three Local “Southern Oregon Edge High-Tech” Leaders

MEDFORD, OR – Thursday, January 29th, the 12th annual Southern Oregon Business Conference featured an industry-inspired theme titled “High Tech – Southern Oregon’s Edge.” This year’s conference focused on the importance of the high-tech sector to the region and highlighted the economic research of [Minoli Ratnatunga, Economist from the world famous Milken Institute](#) and co-author of Best Performing Cities 2014. Hosted by SOREDI and held at the Inn at the Commons from 2pm to 5pm (Door opened at 1:30), this year’s annual event also included a distinguished panel of local high-tech guest speakers from a few of Southern Oregon’s most prominent technology firms.

“The high-tech industry is making a serious impact on Southern Oregon, and because of that, we want to take advantage of increased opportunities for insight and economic growth,” says Ron Fox, Executive Director of Southern Oregon Regional Economic Development. “This year’s conference was not only informative, but motivational as local leaders continue to identify and focus on what gives Southern Oregon the edge!”

Ratnatunga is the co-author of the Milken Institute’s annual “Best Performing Cities” report. She’s got great news to share at the conference, including Southern Oregon’s ranking in the top twenty among more than 179 metro areas in the United States for the growth of our high-tech sector business. Three local high-tech leaders who share responsibility for such a ranking will join the strategic conversation, including [Carestream Site Manager Mike Tylutki](#), [Coding Zeal Founder Adam Cuppy](#) and [Linx Technologies President Tolga Latif](#).

To round out the panel and provide data confirming Oregon’s economic rebound in 2014 and beyond is [Dr. Tim Duy](#), adjunct professor of economics at the University of Oregon and director of the Oregon Economic Forum, Dr. Duy also authors the quarterly Regional Economic Index which he provides on behalf of [KeyBank, the Business Conference’s Presenting Sponsor](#).

The Milken Institute is among the top “think tanks” in America which conduct in-depth research, hosts conferences, and publishes strategic studies. Coding Zeal is a global web and mobile app development firm, Carestream is a international provider of medical and dental imaging systems and IT solutions and Linx Technologies develops and manufactures wireless products. SOREDI (Southern Oregon Regional Economic Development Inc.) is a non-profit organization dedicated to increasing the long-term prosperity of Jackson and Josephine Counties. Serving 13 incorporated cities including Ashland, Butte Falls, Cave Junction, Central Point, Eagle Point, Gold Hill, Grants Pass, Jacksonville, Medford, Phoenix, Rogue River, Talent, and Shady Cove.

Source <http://soredi.org/exciting-southern-oregon-business-conference-january-29-2015/>



**ROGUE WORKFORCE
PARTNERSHIP**

Program Policy

Standard Operating Procedure

Effective Date: _____

New

Revised

Page 1 of 2

TITLE: Youth Needing Additional Assistance Policy

Purpose

To provide guidance for the Workforce Innovation and Opportunity Act (WIOA) youth programs in Jackson and Josephine Counties.

Requirements

Per WIOA section 129 (1) (C) (iv) (VII), in each local area, not more than 5 percent of the in-school youth may use “Needs Additional Assistance” as a qualifying barrier for eligibility.

Scope

Youth Eligibility determination will be carried out by the youth services contractors and overseen and monitored by Rogue Workforce Partnership for the purpose of serving youth in our region to complete school and/or training, and to enter the workforce.

Policy

Eligibility criteria for WIOA Youth Services consist of two primary components: 1) Income eligibility (as set by the Lower Living Standard Income Level, updated annually), and 2) Barriers to Employment. Barriers to employment are specifically listed as the following:

- School dropout
- Basic skills deficient
- Offender
- Homeless
- Pregnant or parenting
- Documented disability
- English language learner
-

In order to receive services under WIOA, a youth must be income eligible and possess one of the specific barriers listed above.

The Workforce Innovation and Opportunity Act allows local areas to provide services to youth who are low income, but do not meet one of the above-listed barriers, for up to 5% of the

region’s youth being served in a program year. These participants are considered “youth who need additional assistance” determined by the needs of youth within the region.

Rogue Workforce Partnership (RWP) has determined that this definition should indicate five additional barriers that are commonly encountered among at-risk youth in Southern Oregon, and is based on an assessment of ongoing needs of youth in our communities. RWP solicits feedback from youth contractors to determine the additional barriers to be included in this definition. As needs change in our region, this policy will be updated to reflect those changes.

In addition to meeting the low income criteria, up to 5% of youth may qualify under one of the five criteria listed below.

| Barrier | Description |
|------------------------------|---|
| Addiction | Substance addiction <u>and</u> either participating or soon to enter a rehabilitation/recovery program. |
| Limited or no work history | Limited or no work history after completing high school or GED. |
| Lack of Parental Involvement | <ul style="list-style-type: none"> • Parents who have limited or no English, who are unable to support their children’s school success or entry into the workforce due to language and/or cultural challenges, <u>or</u> • Parents who have a limited, or absence of, work history and cannot guide their children in job seeking activities. |
| Limited School Attendance | Missing significant time in school due to truancy, illness, family situation such as continual relocation, homelessness, caring for younger siblings, family emergency, or severe trauma within family. |
| Loss of Caregiver | Experiencing the loss of a primary caregiver due to death, divorce, incarceration, or extended military service. |

The Future of WorkSource

Input from employers, job seekers, and service providers on the need for and vision of an effective workforce system in Oregon

JUNE 2014

Southern Oregon Region

Contains summaries of the following

- Statewide Assessment
- Medford Regional Forum

A project of
**The Oregon Employment Department and
Local Workforce Investment Boards**

Report prepared by
**The Center for Public Service, Portland State University, and
Scruggs & Associates LLC**

The Future of WorkSource

Background

The Future of WorkSource is a joint project of the Oregon Employment Department and Oregon's seven Local Workforce Investment Boards. The objective of the project is to examine the effectiveness of WorkSource—what the system needs to provide in order to have value and impact to its customers, how these customer needs vary region by region, and how state and local providers can work more collaboratively to provide integrated and seamless services to employers and job seekers.

To understand where to focus attention and how to deliver services more effectively, the project obtained input from employers and partners across the state. From March 18 to May 10, 2014, the project held four local employer forums (Hermiston, Klamath Falls, Ontario and The Dalles) and eight larger regional forums (Eugene, Florence, La Grande, Medford, Redmond, Seaside, Salem, Wilsonville) that brought together employers, business groups, and workforce providers and partners. In total, more than 700 people participated in these forums.

Prior to the forums, the project surveyed a sample of job seekers that used WorkSource during the fall of 2013. From approximately 5,700 surveys sent, there were 912 responses (870 complete), which represented a 15% completion rate. This information was compared to forum input to understand the dynamics and connections between the supply side (job seekers) and demand side (employers) of the workforce system.

This report is a compilation of these activities, summarizing the direct input from stakeholders as well as regional and statewide analysis trends and perceptions. This report is divided into three parts:

- A statewide synopsis that combines all aspects of the project into a synthesis of statewide trends and regional differences.
- Summaries of regional forums and rural employer sessions.
- Appendix of job seeker survey data and analysis containing statewide and regional analysis of job seekers use and perceptions of the WorkSource system.

The information from this project will be used for in-depth discussion at both the state and local levels to improve services, responsiveness and the positive impact of the WorkSource system including:

- Strategic conversations and assessments, individually and collectively, with the Oregon Employment Department, Community Colleges and Workforce Development, and Department of Human Services,
- Planning and program development for local workforce investment boards (LWIBs),
- Closer coordination of services between LWIBs and multiple state agencies,
- Input to Oregon Workforce Investment Board (OWIB) and the state's workforce redesign effort,
- Coordination with community colleges, individually and collectively, on degree and certificate curricula and sector-specific training opportunities,
- Conversations with the legislature about workforce policy and resource allocations, and
- Conversations with the Higher Education Coordinating Council (HECC).

The report and analysis was compiled by the Center for Public Services in the Hatfield School of Government, Portland State University in collaboration with Scruggs & Associates LLC. The Center for Public Services provides research, education and consulting services to public and nonprofit organizations to improve governance, civic capacity and public management. Contributors include Patricia Scruggs, consulting staff; Catherine LaTourette, faculty; Thomas Swafford, associate staff; Deborah Kirkland, associate staff; and graduate students Caroline Zavitkovski, Valerie Walker, Bonnie Crawford, Ariana Denney and Troyler Fultz.

PART I: Statewide Assessment

This section of the report synthesizes what we heard from businesses, job seekers, service providers and workforce partners around the state--unedited perceptions about the WorkSource system as well as the broader community infrastructure that supports workforce development. While additional details can be found in the regional write-ups and job seeker survey analysis, this summary provides highlights and analyzes the common state themes and regional differences.

FORUM SUMMARY: Employer Highlights

Employers are the primary customers of WorkSource—the demand side of the system that must drive how services are developed and delivered. This section highlights three key discussions with employers; Understanding the workforce trends they are experiencing, how those trends translate into value-added services, and where WorkSource resources could be allocated or deployed to best meet with value.

Employer trends and concerns common throughout the state

Many applicants lack basic skills

Employers report basic skills are absent from a wide range of candidates from entry-level positions to college graduates. Writing and communication skills are among the most common missing skills, along with basic and applied math such as the ability to read a tape measure or making change from a sales transaction.

Applicants are missing other base skills critical to many Oregon industries

Employers consider customer service, basic knowledge of computers and common office software, and familiarity with standard workplace protocols (appropriate attire, punctuality, etc.) as basic skills. They observe older applicants often lack computer skills and have difficulty marketing their skills or experience. Employers also notice significant intergenerational workplace challenges with regards to workplace expectations, especially between millennials and baby-boomers. This suggests a need to better develop the talent of management in addressing those issues effectively.

Applicants lack technical and vocational skills

Employers in a wide array of industries, especially trades and manufacturing, note a significant gap in vocational and technical skills from previous generations. This included a range of skills from being able to read a tape measure or instrument panel to having basic mechanical skills or understanding of what constitutes quality control. Problem-solving skills that are valuable in many occupations, including college degreed jobs, are also missing. Businesses noted a lack in vocational education, statewide and nationally, and the focus on students to be college bound has hurt the competitiveness of many businesses, especially those in rural communities.

Employers are seeing far less early work experience and work readiness skills among job applicants under age 25

Applicants under 25 years of age tend to have fewer work experiences than in previous generations. Employers are seeing more college graduates with low work readiness skills, even in simple matters such as showing up on time. Employers are experiencing lower quality in younger employees' work and/or an attitude of "just doing enough to get by." They perceive the education system as not including job readiness as an important aspect of learning.

Use of staffing agencies and temp-to-hire continue to rise

Because of a lower overall quality of applicants, many employers are using staffing services to find employees through temp-to-hire situations where potential new hires are tested for skills and fit with the workplace. While this is more expensive for employers on a per person basis, it saves them money

in the long run due to the high percent of temps that do not make it through the trial period. If they do fit, however, turnover is greatly reduced and employers are more willing to make investments in training.

Employers rely heavily on different forms of work-based training

In addition to using temp-to-hire as a way to find employees with the right mix of skills, employers noted they are doing more basic skill training just to bring a new hire to an entry-level skill set. This basic training, combined with business or skill specific training means the return on training investment (training ROI) continues to take longer before a new employee is productive. Once an employee is up to speed, employers prefer to promote from within to maintain this investment. This results in a high demand and preference for incumbent worker training to “skill-up” existing employees to replace workers that have either left or retired.

Employers are struggling to use apprenticeship programs

The recession and pressures to lean operations have left many companies, especially trades and manufacturing, without adequate journey level staff to take on the number of apprentices that they need. Furthermore, a significant number of businesses reported that age restrictions on the use of equipment prevented them from attracting students into apprenticeships or pre-apprentice training.

Employers are concerned with retirement and succession planning

As the economy improves, employers are starting to see more of their older employees consider retirement. With little job growth over the past five years, there are fewer people in the pipeline to move up within the organization and recruitment from the outside is costly or difficult. This is especially a concern with smaller and rural businesses.

Structural cliffs in government assistance hurt lower income workers

Employers in all regions commented that unemployment insurance payments and wrap-around assistance such as food stamps or transportation assistance were an “all or nothing” program making it difficult for job seekers to take an entry-level job and risk losing the support they needed as they transitioned back into work. This meant that qualified applicants often declined jobs reducing the applicant pool even further for employers.

Additional Rural Trends

Employers in rural regions face additional challenges in finding, training and retaining workers. These challenges include:

- A **high portion of seasonal jobs** means many workers hold multiple jobs in a given year and rely on temporary seasonal unemployment to make it through leaner parts of the work year.
- **Geographically disbursed workforce and employers** often mean longer commute times, even for lower-wage jobs. Combined with seasonal industries, transportation costs are often a significant barrier to keeping employees.
- Employers having to go **outside the region to find professional, technical and management level** positions. Even after casting a wide net, recruiting mid to high-level occupations to rural communities is difficult, especially when there is a trailing spouse or partner who would also need employment. Often compensation packages are more costly and retention rates are low.
- A lack of a local qualified workforce encourages companies to steal good employees from one another—despite knowing this is not good for the long term regional economy.
- **Drug use**, especially methamphetamine, was noted as serious problem in eastern and southern Oregon with many applicants failing drug testing. The ability to address this issue as part of an overall employment strategy will be critical.

Rural employers also had a more **difficult time accessing WorkSource services due to the distance between the company and WorkSource offices**. It was suggested that for specialized or critical services that a portion of WorkSource staff travel either directly to businesses or to partner offices throughout the region or that more services are offered in a virtual fashion.

What Employers Value and Want from WorkSource Services

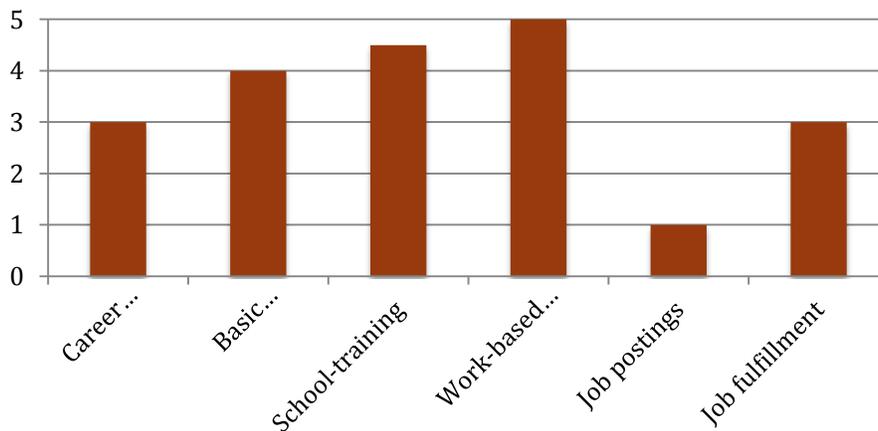
Employers view the WorkSource system as a set of inter-related services, where more efficiencies and impact could be gained through enhanced coordination and improved marketing of available services. To achieve this vision, businesses want WorkSource to have a **broader pool of applicants with a wider range of skills and education**. For example, they suggested community colleges and universities put graduates into the WorkSource system. With this broader set of applicants, WorkSource **could provide more services to a wider array of job seekers and employers**, rather than the perception that most resources are being spent on a low percentage of the unemployed with significant barriers to employment. These expanded services would include **significantly more training throughout a worker's employment history** and earlier focus on youth work experience to get Oregon's workforce off to a good start.

Employers envision **data systems that go beyond job matching**, which analyze regional and state employment trends and manage customer relationships in such a fashion that **informs the types of regional training or job preparation services needed**. With more robust information, employers imagine WorkSource **better connected with regional and state economic development organizations** to be more proactive and strategic about business expansion and recruitment efforts. Armed with better information and improved links to the regional economy, WorkSource's **connection to K-20** could be more effective in promoting the jobs and skills needed to grow local economies.

Allocation of resources

The forums asked employers to allocate where they would like to see WorkSource resources allocated by key six functions. Each employer allocated \$100 in \$5 increments across these functions. The results were then totaled and adjusted to a scale of 1-5, where 5 represented an area that employers wanted to see significantly more resources, and 1 was an area where they saw little value.

Employers' desired allocation of WorkSource resources



Training stood out as a highly valued and underserved function with WorkSource. The top three immediate issues for employers across the state were:

- Increasing **incumbent worker** training to help businesses maintain critical occupations and fill the increasing number of retirement jobs.
- Enhancing **basic skills training** that improve the quality of the current applicant pool and for which WorkSource should verify self-reported skills and credentials prior to a job referral.
- Expanding **on-the-job training, apprenticeships**, and **career-technical education pathways** to get new workers in the door and up to speed as quickly as possible.

There were also several overall **policy issues** that employers felt were limiting their ability to find, train or retain employees. Employers encouraged WorkSource and OED to examine:

- The **structural cliff of unemployment payments and other government funded services** that end abruptly at the time of employment and do not help workers with limited means transition into new jobs.
- **BOLI restrictions** on the use of machinery and equipment that prevent youth from obtaining early exposure (and interest) in trades and vocational occupations and journey/apprentice ratios that limit the number of apprentices business can have.

There were four high value services that employers identified as foundational services that maintained the pipeline of qualified workers. These were:

- Expanding WorkSource’s **customized recruitment** process and developing industry sector specialists as the program expands.
- Advocating for and working with K-12 and community colleges to expand **career and technical (“vocational”) education and skills centers, and to establish trade schools.**
- Enhancing access to **youth programs that provide early work experience and job readiness skills**, ensuring that these programs reach the broadest base of all youth, not just those at risk or high performing.
- Focusing **career planning and job preparation services on opportunities in regional industries;** Sharing this information with K-12, community college and other educational career counselors as well as their students so that information on a wide array of occupations (not just college-bound) is current and consistently promoted.

In terms of other value-added functions, employers wanted WorkSource to:

- Have a more **consistent brand** and overcome the outdated perception of the “unemployment” department and strive toward an image where all workers, employed, unemployed or under-employed would come to be connected with appropriate training or employment.
- Establish a **concierge type system** where there is no “wrong door” to enter. Where WorkSource partners have a clear understanding of each other’s programs and can share this information enabling employers to continually meet with or provide information to multiple organizations within the WorkSource system at one time.
- Utilize the information collected by WorkSource databases not just for job placement and referrals, but as a customer relationship management (**CRM**) **system** for proactive analysis that can develop forward thinking training and job preparation services and better two-way communication with employers.
- Assist with **intergenerational workplace dynamics;** helping employers understand how to accommodate style/expectation differences and helping workers understand the types of difference that are non-negotiable in certain workplaces.
- Provide **HR and succession planning** help to small businesses, as well as helping these companies with basic HR related needs like how to write good job descriptions or screen and hire employees. In rural areas this would mean having a specialist travel throughout the region.

*At the end of the day, employers defined WorkSource’s success as supporting a workforce that helps businesses grow, to hire new employees and sustain competitiveness by investing in **continuous skill development.***

FORUM SUMMARY: Provider/Partner Highlights

The provider section of the regional forums started with the end in mind—specifically asking what an effective WorkSource system would look when it was adequately aligned with employer and job seeker needs. The forums then discussed how to reach this vision by identifying what was working and where innovation was needed. Many of the vision statements and suggestions for innovation were very consistent throughout the regions. Common themes and desired programs or services are described below.

A Shared Vision and Key Services of a High Performing WorkSource System

Acting as a cohesive system

- Having a more uniform branding of WorkSource with
 - Consistent use of WorkSource as the overall brand name,
 - Co-location of service providers, and
 - Joint marketing of partner services, all under the WorkSource brand.
- Establishing a system where partner services are well known to each other and those services are better coordinated among providers, appearing seamless to the customer by:
 - Sharing databases and linked program information,
 - Greater standardization of program eligibility, and
 - More consistent training and joint on boarding of staff.
- Developing a common set of customer-focused metrics that are used to set program metrics within individual agencies or organizations.

Focusing on high value, high impact services

- Allocating more resources toward work-based training that enhance employee productivity and helps employers to be more competitive and positioned for growth. Such training must accommodate unemployed, under-employed and incumbent workers.
- Expanding customized recruitment, which includes verifying skills and credentials of candidates and connecting employer information to job preparation and career planning services.
- Having a multi-tiered triage process for job seekers (rather than a one size fits all welcome process) that could quickly identify customer needs and the level of service required so those with fewer needs could quickly find assistance and those with greater needs could receive more coaching.

Being more proactive and customer driven

- Developing a more systematic way to work with regional industry sectors and business groups to identify potential hiring needs as well as basic, critical and hard to find skills that are common among groups of employers.
- Establishing methods by which hiring trends and critical skills can be more systematically analyzed by region and industry. Using this information to:
 - Develop cohort-training programs for skills common to an industry or multiple employers (such as customer service and basic office software skill for hospitality and related industries).
 - More complete and robust profiles of local industries that include desired skills and descriptions of the work environment and workplace expectations that can be used in career planning and job preparation services.
- Having stronger collaboration between small business development centers and chambers or business groups to help businesses, especially small businesses, be more strategic about HR and succession planning.

Helping youth become job and career ready

- Reinvesting in vocational and career/technical education in high schools and community colleges, stressing to students and counselors the importance of these skills not just for jobs in manufacturing or the trades, but also for a wide array of professional/technical occupations where applied problem-solving skills are highly desired.
- Creating more strategic connections between WorkSource and K-12 educational partners to:
 - Share information about local career opportunities with students and career counselors, stressing all types of careers not just college bound occupations.
 - Help youth understand the importance of job readiness skills working earlier with youth on job preparation skills such as basic communication skills, interview conduct, and basic workplace expectations.
- Providing more opportunities for early work experience to all youth, not just those who are high risk or high performing.

Unique Rural Needs

Some challenges and desired services differed by region, with the most contrast occurring between urban and rural areas. Rural areas appeared to have some additional challenges, mostly due to geographically disbursed offices and customers that require more flexibility in how some services are delivered.

Establishing mobile service delivery

- With less concentrations of both employers and job seekers, rural regions identified a need for more ‘mobile’ services for staff to travel to different parts of the region, rather than having customers travel to WorkSource offices. This was especially true for staff with industry specialization or less frequently needed services such as HR and succession planning for small businesses. Two ideas were mentioned: 1) having a mobile office (e.g. the book mobile) that could travel directly to employers or places where job seekers gathered, and 2) having a place inside a local Chamber of Commerce, SBDC, or local government office where a staff person could conduct business.

Addressing unique challenges of seasonal workers

- With a higher reliance on tourism, agriculture and natural resource industries, rural regions noted more challenges with seasonal and part-time workers. Helping them find multiple jobs and work within unemployment insurance requirements is a constant dilemma. To help address this issue several ideas were suggested:
 - Have OED - at the state level - conduct an analysis of seasonal jobs for each region and note those with complementary skills and where the seasonality (the timing of work) dovetails with one another.
 - Use the above information to develop basic skills training programs that can build skill sets crossing industries or jobs. Work with employers on better job referrals for seasonal workers.
 - Examine UI restrictions to identify the means by which seasonal workers might be able to work a limited number of days without losing all or part of their unemployment insurance.

When asking WorkSource providers and partners about priorities—what they needed to “get right”—recommendations were broader than just more funding. In reviewing key issues, most did not require new or additional funds, rather a shift in how resources are being used. These high priority recommendations can be categorized in four segments:

- **Operational changes:** Issues that were not based on resource allocation such as having common metrics, developing joint strategic plans between agencies, more interaction among staff to share best practices, etc.
- **Policy refinements:** The ability to leverage resources and improve the impact of workforce services by examining and adjusting policies such as apprenticeship requirements, how UI impacts seasonal

industries and jobs, the use of technology and social media to reach and communicate with customers.

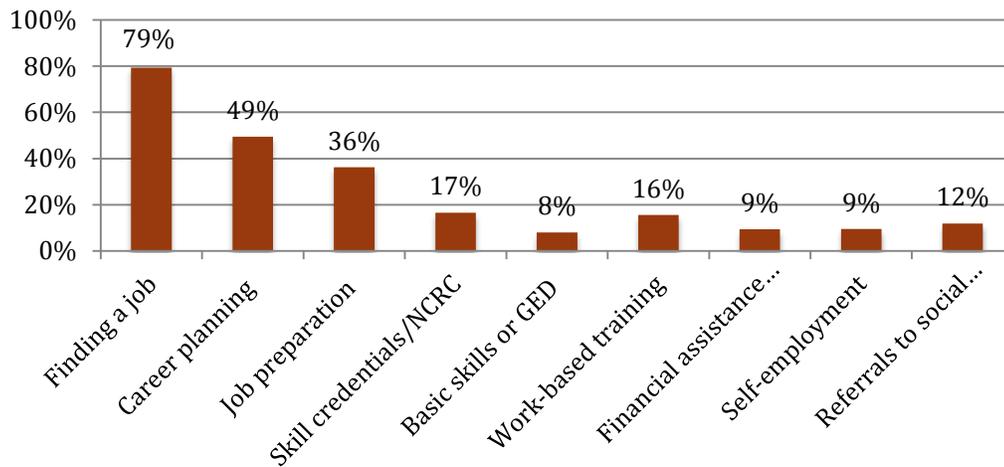
- **Resource reallocation:** Changes that would shift resources from services that had low value or impact to services with higher customer value. Examples include less resources allocated to job postings and more on work-based training and customized recruitment, more industry specific skills training through small groups (cohorts) rather than individual training not linked to local jobs, or moving to a multi-tiered triage/welcome process by simplifying I-Match Skills.
- **Resource enhancement:** Services or foundational issues that will require new or additional investment. A primary example includes the reinvestment in career-technical (vocational) education across the state.

Job Seeker Survey Summary

The job seeker survey asked questions related to the initial perception of WorkSource, the services used, the satisfaction with services, the reason for not using certain services, and what respondents would like to see in future services. Unless noted, responses were similar across regions, and issues with services were generally related to program restrictions rather than the knowledge or helpfulness of staff.

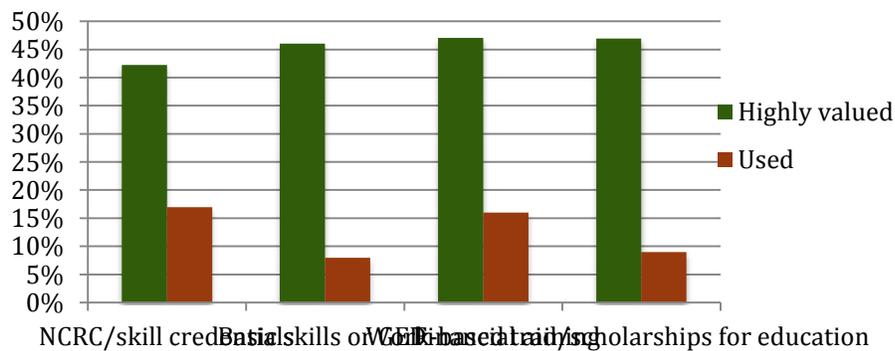
- More than 80% of job seekers knew little about WorkSource prior to their use or viewed it narrowly as a place for unemployed workers. This underscores perceptions of WorkSource still having the stigma as the “unemployment department.”
- Almost 90% of respondents first came to WorkSource due to their unemployment claim; few came because they were seeking services outside of unemployment. This reinforces the claims that the public does not know WorkSource offers training, skill development, youth and other workforce services.
- Once in the door, respondents used WorkSource primarily for three related job placement services—79% used job referral services, 49.5% took advantage of career planning and assessment services and 36% used job preparation services.
 - More than 80% thought these services met or exceeded expectations.
 - More than 60% of those dissatisfied had some postsecondary education and commented that services were too basic or jobs did not match their skill/experience level.
 - Those that did not use the services felt they did not need them.
- Training and skill development services were far less utilized – ranging from 8-17%, often lower in rural regions, especially in Eastern Oregon. These included basic skills training, work-based training, GED courses, financial aid for school based training, and National Career Readiness Certificate (NCRC) or other credentials.
 - Approximately 70% of those using the services thought they met or exceeded expectations (lower than the job placement services).
 - Those dissatisfied with the services noted schedules were inconvenient or not offered often enough, or that the program restrictions or content made them less than optimal.
 - While many not using these services felt they did not need them, a significant portion of respondents noted they did not know about them or wanted to use them yet were told they did not qualify.

Use of WorkSource Services Statewide



- The current use of training and skill development services are low (approximately 12% of respondents noted using these services). This is due primarily to the amount of resources currently allocated to them. To understand the potential need and value for these services, job seekers were asked to what extent would they value or use these services in the future if they were more readily available. In general, over 45% of respondents viewed them as a very valuable part of WorkSource services (the green/left handed columns in the chart below), and another 38% said they had some to moderate value (not represented in the graph). Comparing the current use of training and skill development services to the percent of job seekers that placed the highest value on them, we can approximate a value gap for these programs. These gaps were most acute in rural areas of the state. The gap clearly indicates that current training services are not adequate to meet the potential demand. Write-in comments indicate that the content and delivery of these services also need to be updated.

The value respondents place on having skill development and training programs



- iMatchSkills (the job matching tool) was not well utilized; almost 60% of those starting iMatchSkills did not complete it. An overwhelming number of write-in comments used terms like complicated, hard to use, useless, cumbersome, or ineffective to describe iMatchSkills.
- Customer satisfaction with staff was very high. Statewide, over 90% of respondents had a favorable experience with WorkSource. When asked what their best part about the WorkSource experience was, respondents choose friendly and knowledgeable staff and a welcoming office three times more

often than other choices. Write-in comments underscored this with positive statements about how hard staff tried to assist even if program eligibility may have prevented the respondent from using a service.

Six implications from the job seeker survey data stood out that had high correlation to input from employers and providers. These were:

- People’s misperceptions about WorkSource prevent those not seeking unemployment insurance from using the system, narrowing the pool of more qualified applicants significantly.
- Employers report using WorkSource for posting mostly entry-level or lower wage jobs (due to their perception of who uses the system), while 39% of WorkSource users have an associates degree or higher. This has resulted in a lack of services, operating processes or job posting for those with higher education levels who are unemployed or looking for a new job.
- Current job matching tools (iMatchSkills) is ineffective; with job seekers noting that the one size fits all triage process is not working. They do, however, view the staff assistance and coaching as very useful.
- Training programs, especially work-based programs, are highly valued by job seekers and they wish to see more resources allocated to training and increased flexibility in being able to utilize these programs.
- There is a disconnect between the low use of basic skills training and the high percent of job seekers with low educational attainment levels. This could imply that the capacity of basic skills programs may be inadequate; the content may not be well connected to jobs, or the marketing to job seekers is not effective.
- Regions with lower levels of partner integration and co-location had the lowest customer satisfaction rating, emphasizing the importance of intentional collaboration in providing a seamless delivery system.

SOUTHERN OREGON FORUM

Medford

April 14, 2014

On April 14th 2014, approximately 71 employers, business groups and service providers gathered in Medford to discuss workforce issues in Southern Oregon region. Employers discussed trends and what they need from workforce services to find qualified workers and remain competitive; service providers and workforce partners discussed how the system could better respond to employer and job seeker needs. This is a summary of their strategy session.

Part I: Employer Session

Employer Workforce Trends in Southern Oregon:

We asked employers about the trends that are affecting how they find, train and retain employees. What challenges have they faced in this part of Oregon and how have these challenges affected their business.

Trends in finding qualified workers

- Overall, employers noted the **quality of applicants seems less adept while the quantity of applicants is increasing.**
- There exists a perceived **lack of basic operational skills in manufacturing and trades** especially for positions that rely on meeting quality control measures.
- Employers are **using an array of recruitment resources** and methods to find employees:
 - Craigslist
 - Referrals from existing employees
 - Partnerships with OIT, SOU and Rouge Valley Community College
- **Social Media** has become important in recruiting: Facebook and Twitter for entry level and LinkedIn for Executive level positions. There is a trend in Southern Oregon towards spending **more time and effort in the hiring process.** Mistakes in hiring are costly and it was reported that hiring managers are **being more deliberate and careful.**
- Employers say they **rely more heavily on staffing agencies for temporary workers.** While this allows for a workforce that is “virtually on-demand,” employers recognize that temp status delays the employer’s training investment in the worker, and in turn the worker’s commitment and sense of belonging to the organization.
- **Rewriting job descriptions** is yet another approach these employers are using to clarify what their jobs really require. To make **job postings seem more “fun”** and to address the work-life balance concern, some companies are changing job descriptions to more of a **“day in the life” narrative.**
- **Mentoring during on-boarding** is fast becoming a common practice. This accomplishes two goals; **faster enculturation** of new employees and increased job satisfaction and engagement on the part of the mentors who usually enjoy imparting their institutional knowledge to the new workers.
- **The cost of transportation** in the region is expensive for job seekers traveling to interviews and the relative cost of the daily commute for workers in the entry-level positions.
- **Generational differences affecting behaviors and expectations** among workers were a concern among employers from the early boomer demographic. The upcoming generation is just as concerned about work-life balance as they are about having a career.
- **Employers noted that some applicants are applying for their open positions to satisfy unemployment insurance requirements** to demonstrate weekly job search activity. In many cases

- these applicants are not qualified for the jobs. A possible solution mentioned was **better initial screening prior to referral.**
- **Employers have found that hiring workers for temporary and part time work during the off-season is difficult.** Many workers use unemployment insurance (UI) to fill in during off-season lay-offs and the UI policies often create a disincentive for job seekers to take the job.
 - Employers are finding that **some job seekers won't accept positions if taking the job will cause an abrupt termination of their wrap-around governmental benefits.** Some applicants need transition time and a ramp-down period from reliance on government assistance. For example, if there is a concern over losing housing allowance or food assistance it can be a disincentive for a job seeker to choose the employment opportunity.
 - Some employers noted **concern about expanding beyond the 51st worker** due to requirements of the Affordable Care Act.
 - Employers are finding that applicants who lost jobs to no fault of their own are **less motivated to take jobs of less or equal pay.** It was suggested that perhaps a WorkSource program could **supplement the difference** for a period of time or until the employee catches back up.

Trends in training and retaining workers

- **On-line training & recruitment** is becoming more prevalent. Just in time or burst learning was mentioned as those approaches do not incur a full day of lost production.
- **Employers are emphasizing the Southern Oregon lifestyle** as a way to entice applicants to the region. It is seen as a part of the "compensation package."
- More businesses are **developing in-house training** for upward movement and for leadership/management development. While the companies know the skills, knowledge and abilities they need, many report they are **not well equipped to deliver** these types of training.
- The **Trio program** was mentioned as a success with one caveat; often the student who is eligible comes from a family where no one has post-secondary education or experience navigating the employment application process.
- **Tuition reimbursement** is an approach used by employers to retain workers. Several businesses noted that they will work with students and pay for all or a part of their higher education if they agree to work for the business for a specific period of time.

What Employers Value

Employers were asked to describe valuable workforce services, regardless of who provided them. Where did services have the greatest impact on their ability to find or retain employees, or their ability to ensure that workers were productive contributors to the business?

Training Services

- **Almost all employers place a high value on work-based training.** Work-based or on-the-job training that brings new employees and incumbent workers advancing to different or higher skilled jobs up to speed as quickly as possible. For some industries, including manufacturing, the return on investment for new hires is 12-18 months. Many would like to see the state share costs and risk in the new hiring process and noted models that are working in other states. An example specifically mentioned is the **Georgia Works model** which utilizes a 3-month 100% wage subsidy from Unemployment Insurance, similar to Oregon's previous Jobs Plus program for UI (the Jobs Plus still exists for TANF clients, but not UI clients). These programs help offset the high initial costs to employers..
- **Employers want to see customized training, especially where WorkSource and community colleges leverage resources** to deliver training that is aligned with business needs. Employers commented that curriculum creation took too long, sometimes up to 18 months to adjust to workforce needs. WorkSource training specialists should be more responsive and move "at the speed of business" as one person put it.

Workforce Preparation: Career Planning, Job Readiness Skills And Basic Skills

- Employers find value in **the job preparation services** that WorkSource offers to applicants that include how to write a resume, present themselves in an interview, and other guidance in effective job searching. Employers, however, feel that not enough applicants take advantage of this.
- **Employers think highly of programs that engage them directly with high school students in areas of career planning.** They noted the following effective efforts:
 - **Careers in Gear.** A good idea but needs follow up as it takes place at the end of the school year and momentum is lost. Have refresher events throughout the year to reinforce career options. This could be followed up at the college level.
 - **Open houses** where businesses talk about what they do and what education it takes to join their company.
 - **Early work readiness** in high schools, in K-12, embracing more programs like Junior Achievement.
 - **Entrepreneurship programs** that highlight business skills.

Assistance With Talent Acquisition

- Since many employers use staffing agencies, they view the **two-way communication between WorkSource and staffing agencies** critical for the development of a stronger applicant pool and more seamless referral processes.
- **Employers value good data and informatics.** They would like to see more analytics applied to the WorkSource system. For example, looking at pools of applicants for common skill gaps in order to proactively provide relevant and timely job readiness training, or understanding the seasonality of jobs to prescreen applicant pools for anticipated openings. Employers would also like to see recruitment and referral databases managed more like the popular and effective customer relationship management (CRM) systems used in business to manage sales relationships.
- Employers think highly of WorkSource's **customized recruitment** that offers active, focused job fulfillment services. The value is both immediate and long-term: businesses get qualified workers and WorkSource staff develop an understanding of the employer and their industry that continues beyond the immediate job placement.
- Employers and staffing agencies value **prescreening functions, especially drug testing.** Staffing agencies in particular would like to see drug testing as a requirement for receiving WorkSource services.

Collaboration with WorkSource Partners

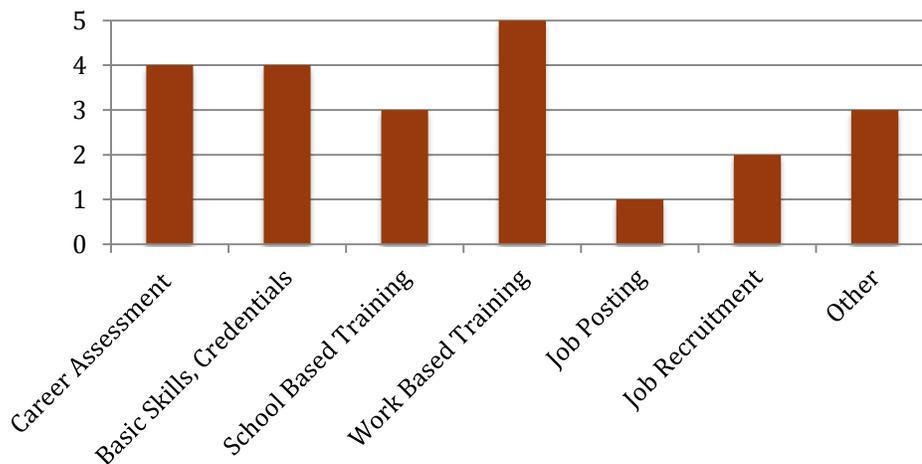
- **Employers want to work with one contact and easily have access to all relevant services.** They don't know what's available to them and want a "concierge" to lead them to beneficial programs and services seamlessly without concern about agency jurisdictions or provider boundaries.

Desired Allocation of Resources

We asked employers to allocate where they would like to see WorkSource resources allocated by key work-based training for new or incumbent workers, d) school-based training, e) job postings, and f) active job fulfillment (recruitment and screening). They were also allowed to list any other services that were not part of the current service offering.

Each employer was given \$100 (of play money) in \$5 increments and asked to spend the money these functions. The results were then totaled and adjusted to a scale of 1-5 where 5 represented an area that employers wanted to see significantly more resources, and 1 was an area where they saw little value. The following is a summary in order of importance what they hoped to see in the future.

Desired Allocation of WorkSource Resources by Southern Oregon Employers



Employers in Southern Oregon noted the need for significantly more **work-based training** and it topped their list for resource allocation. Having more **flexible OJT funds for incumbent workers, and more apprenticeships** and career-technical education pathways are critical to their ongoing competitiveness. As with other regions, employers viewed this as a return on investment (ROI) issue. More training funds would mean their workers would be productive sooner and their business would be more successful. They also thought that there was a role for the state to cost share more accurately based on the actual costs and time to train new employees. For example, if it takes 6-12 months to get a new worker up to speed, and turnover risks are still high as employers continue testing for goodness of fit. A 6 month Georgia Works or UI Jobs Plus program would help to share the cost and reduce the risks, and workers would be considered temporary employee compared to the current Back to Work Oregon OJT program..

This suggests that WorkSource:

- Allocate more funds towards work-based training and enable a portion of those funds to be used for incumbent workers.
- Establish a tiered structure for training that is cost-shared based on an ROI model.

Employers also wanted more resources allocated toward **career assessment and job preparation**. Specifically, companies wanted the WorkSource system to have **more information about local industries** and careers, and ensure this information was covered in K-20 education for students and guidance counselors. They also wanted to see career assessment and job preparation include an understanding about various **work environments and working conditions** in order to set accurate expectations about the skills and behaviors required to be successful on the job.

This suggests that WorkSource:

- Develop more robust information about local industries and jobs, including both skill and work environment information.
- Work with K-12 to share information about local careers and help bring employers into classrooms and career fairs.

Basic skills and credentials rounded out the top three requests for resources. In this category employers stressed the importance of **vocational skills** and the ability to **verify a worker's credentials**. The lack of vocational education in K-12 meant that many applicants lacked the basic skills necessary in manufacturing and trades positions such as reading a tape measure, or operating a machine. Applicants were also found deficient in many of the basic **customer service skills** needed in retail and professional

service jobs. In addition, there was much conversation among the employers about applicants not understanding the business need for quality. In school a “C” grade means you pass. At work “C” grade work is not good enough. Such a low standard is not acceptable to most employers and will result in job termination. They would like to see the basic **concepts and applications of quality control** included as part of basic skills training.

This suggests that WorkSource:

- Develop basic skills-training that includes more base knowledge and applied learning for customer service and quality control.
- Develop a system whereby credentials can be verified before a referral.
- Be an advocate for enhancing vocational education in K-12.

In addition to the traditional functions of WorkSource, this employer group placed significant emphasis on better two-way communications with employers and having a **more robust customer database (CRM system) that connected job seeker information with employer needs**. A way to systematically **analyze data from both the supply and demand side** to proactively identify gaps in skills or trends in hiring that could allow services to be more connected with local economies.

Other highlights included:

- School-based training resources centered on vocational education and early work experience for youth.
- Maintain customized recruitment and work more closely with staffing agencies.
- Address the cost to screen applicants, including mandatory drug testing.

Part II: Provider-Partner Strategy Session

Immediately following employer input, WorkSource providers and partners conducted a strategy session to explore the following questions:

- Based on employer and job seeker input and your experience, what does an effective WorkSource system look like? What are the desired outcomes?
- Based on this vision, what's working?
- Where are the opportunities to do things differently or to be more innovative?
- Of all the issues discussed in the above questions, what must we "get right" (what must be in place, what must we do first, etc.) in order to reach our vision.

What is the vision of an effective WorkSource system?

Overall

- **Business needs drive** the workforce system, and workforce plans are **well integrated into regional economic development strategies**.
- **Employers and job seekers use the system** because it is **customer focused** and can easily respond to their needs at whatever stage or level of experience and education they may have.
- There is **no wrong door by which customers enter** because partners have a seamless referral system.
- The process **accommodates a combination of coaching with appropriately placed tools** and services so that there is both **consistency in the quality**, yet flexibility and **customization for individual customer needs**.
- **People are aware of WorkSource** and WorkSource is known for training, career development and other services beyond the preconception that it only assists unemployed Oregonians.
- **A broad cross section of employers are engaged in WorkSource** because the pool of potential workers and other business development **services are robust and responsive to changing needs**.

Services to employers and industry groups

- Funding is redirected to **support more work-based training**.
 - There are more **incumbent worker training services** that help increase business competitiveness and worker retention which prevents unemployment. Expand upon the region's successful PowerUp Academy.
 - There are more work-based training services such as the Georgia Works/Jobs Plus program, On the Job Training and other work-based trainings for transitioning workers.
 - There are **more programs for youth to gain work experience** that includes summer and seasonal work, apprenticeships, etc.
- WorkSource provides **services that help businesses be competitive** as well as find quality workers. For example, giving employers access to current salary comparisons.
- **WorkSource collaborates with staffing agencies** to broaden the applicant pool, and enhance the basic and base skills of candidates in order to better meet employer qualifications.

Services to job seekers and youth

- **Career information** clearly shows the basic, soft and technical skills needed for jobs in various **industry sectors** with additional information about **regional employer expectations**. Assessment tools are aligned with this information to easily create pathways for jobs seekers.
- K-12 and community colleges have **strong vocational education** programs **connected to regional industry**. Technical and STEM (Science, Technology, Engineering and Mathematics) programs at the region's 4 year higher education institutions (SOU and Oregon Tech) are also strongly connected to regional industry.
- There is a **multi-tiered, user friendly triage process** that quickly moves people into services

pathways. For example, job seekers with experience and fewer needs can use self-service effectively, others may need a mix of personalized and self-service, and those with multiple needs that may require more coaching.

- Staff provides **personalized services with an advisor or coach that helps a customer navigate various referrals** with accountability is to the customer, not the process.
- There are **mandatory industry-directed hiring requirements, such as drug testing**, that WorkSource performs to pre-screen job seekers before they can use additional services, and occurs prior to the referral to employers.

Partnerships and systems integration

- All **partners collaborate with common vision, services and results—the broad “we.”**
- WorkSource staff is well-trained and cross-trained to understand how partners and providers contribute to the value chain of workforce services with visual maps of services and unique contributions of partners. Where possible services are co-located, co-marketed and co-branded with a shared website.
- WorkSource partners are **quality driven** with a share set of **customer outcomes that drive services**, rather than metrics tied to the quantity of services provided by each agency.
- **WorkSource and K-12 work closely together** to promote a broad range of careers that are tied to local industries as well as to student skills.
- There is a **comprehensive client records management system**:
 - Key information collected in **databases is shared among providers** resulting in less duplication of services and **easier transitions for customers** to utilize different services.
 - There are **cohesive metrics** used by all key partners.
- We have the ability to **share ideas and pool resources** so we don't reinvent the wheel.

What's working?

Overall

- **Partners are working together** and share a passion for helping job seekers and employers.
- There is growing awareness about the **need for vocational training** although resources are not available yet.
- **Wrap around services** are assisting people with barriers

Services to employers and industry groups

- Services provided by the **small business development centers are working effectively** in helping the smaller employers in the region. In addition there is strong support for entrepreneurial efforts and **business incubation programs**.
- Supporting employer **job fairs** and marketing local career opportunities.
- **Work-based training** programs like Jobs Plus, and OJT are working well although more flexibility in delivery options and targeted content could better meet local needs.
- **Producing economic and occupational information** that is specific to regions and industries.

Services to job seekers and youth

- Reemployment eligibility assistance that offers **more coaching and personalized services** for job seekers.
- **Training programs that are industry driven** are effectively providing targeted and timely support to job seekers such as Power Up Academy and the Foundation Skills program.
- **WorkSource is helping applicants to get their GED and NCRC certifications** that positively affects job seeker self-esteem and employer interest in applicants.
- **Programs such as Career in Gear and Youth Success Expo** are bringing youth together with educational professionals and employers. These programs have been very successful in **exposing students to careers in the region** and the opportunity to network with employers from all different

industry sectors.

Partnerships and systems integration

- **Co-location of partners** with access to leadership has yielded greater efficiencies, effective referrals and stronger collaboration.
- Having **intentional networks of partners** who are providing important services to job seekers such as Southern Oregon Success, the effective alignment of DHS and WorkSource programs, and the collaboration of DHS with mental health services.

Where can we do things differently or innovate?

Overall

- **Organize services and metrics that are customer-driven**, then **leaning processes** so there is more ability to serve individual customer needs across partners rather than batching services by agency.
- **Develop larger pools of applicants**; working with community colleges, staffing agencies and others to increase the number of applicants in the system.
- Establish a region-wide strategy that **brings together industry-education and WorkSource** to address **vocational education** needs and resources.

Enhanced services for employers and industry groups

- **Establish a process by which employer services are driven by a return on investment (ROI)** process that clearly defines the value to employers. This leads to **more employers using the system** and more job seekers seeking WorkSource services to access these jobs.
- **Develop sector specialists with WorkSource** that are well versed on regional industry needs and skills sets. Specialists are shared among regional offices.
 - **Specialists understand the “base” skills needed by each industry** (the level above basic skills that are common across multiple occupations within an industry such as mechanical aptitude or basic quality control for manufacturing or specific customer service skills for e-commerce companies).
- **Provide more and various options for targeted work-based training** that could include cost-sharing among regional employers (Georgia model). This will foster greater willingness on the part of employers to take the risk in hiring new workers. Provide additional resources for incumbent worker training, especially those that tie-in with economic retention and expansion projects. Connect WorkSource and community college training resources in these efforts.
- **Expand apprenticeship programs and career-technical education pathway programs** Partner with labor, utilities and other large private and public sector employers to enhance the use of apprenticeships and current or newly formed **career-technical education pathway programs**.
- Be more **proactive in understanding business employment needs** enabling WorkSource staff to refer qualified candidates who are a good “fit.” Employers will be more inclined to invest time and energy in bringing new employees up to speed.
- **Host employer fairs** where businesses speak directly to job seekers about skills, job readiness and workplace expectations. **Have WorkSource staff and staffing agencies attend** so they also hear and reinforce this message.

Enhanced services for job seekers and youth

- **Fund youth programs that provide work readiness skills and work experience.**
- **Retool iMatchSkills** or create **better and quicker assessment tools** that do not overwhelm new customers, is **tiered-based on the customer’s profile**, and where **information is used for more than job matching**.
- **Develop a coordinated triage system that would be able to** identify eligibility to other partner programs regardless of which door the customer entered and provide customized services so those with fewer needs can use self-service programs and those with greater needs access more coaching.

- Have an **advisor or coach** for customers with extensive needs **who stays with job seekers** through referrals and training; **give customers a single point of contact** that can when appropriate assemble a **“task force” or response team** based on needs.
- Supply **comprehensive information about all training services** so it is easier for partners and job seekers **to determine the best use of resources**. Partners need to work together to refine training services and focus on their niche so there is **less duplication and more resources available for reallocation to other identified services**.
- **Use technology that is already available and familiar to customers** such as Skype, texting, Twitter, Facebook, email. Use these technologies to route notifications among multiple customers and partners.
- **Ensure NCRC is available at all high schools and WorkSource centers**. Provide clear data demonstrating the value of the certificate for job seekers and employers.

Enhanced partnerships and systems integration

- Develop a **cohesive brand for WorkSource that consistently uses the WorkSource name with all partners, use language that is easy to understand** and create more co-location opportunities where possible.
- **Promote a culture of cooperation where partners have regular events** for sharing information about programs, services and what’s working well. Conduct **new WorkSource employee orientation that contains information about services from all partners**, not just the hiring agency or organization.

What must we get right?

At the end of the day, we asked providers where to start. What aspects of the WorkSource system do we have to get right if Southern Oregon was to achieve their vision?

Have a cohesive vision that is customer driven and shares metrics that are consistently used by all partners.

Deliver services that are demand driven and implementing processes that **utilize lean principles** to increase quality while enabling more responsiveness and cost-effectiveness.

Provide a user friendly, multi-tiered triage system for job seekers that can create more individualized services based on needs. In keeping with the recognition that one size does not fit all, assessment resources can be reallocated to those needing additional coaching and individualized support.

Establish more effective integration between WorkSource and K-20 to promote both career and job readiness skills to students, educational staff and parents; these educational programs should include applied learning opportunities to help set realistic expectations about working environments, salary levels and hiring requirements.

Develop a shared data system with timely programmatic communications that is easily shared among partners and has features such as:

- Universal eligibility built in so “total” service plans for customers are efficiently developed and managed.
- Ability to identify redundant services to facilitate the redeployment of resources to high need areas.

Align staff expertise and programs with sector and economic development strategies:

- Sector specialists who can be shared among offices in the region.
- Robust information on skills and workplace expectations that is communicated to all staff working with job seekers.

2015 Workforce Development Community Forums

A Report for the Oregon Workforce Investment Board

*Input from nine Workforce Development Community Forums
on the OWIB's and LWB's Strategic Planning.*

COMPREHENSIVE REPORT

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Comprehensive Report of the 2015 Workforce Development Community Forums

Background

The Oregon Employment Department and Oregon's nine Local Workforce Boards co-hosted a series of Workforce Development Community Forums in July and August of 2015. Based in part on feedback from the 2015 Future of WorkSource Forums, Oregon's local workforce system is now organized into nine local workforce investment areas. These meetings were held in each of the nine local areas:

- Eugene- July 8
- Portland- July 10
- Wilsonville- July 15
- Salem- July 22
- Lincoln City- July 24
- Medford- July 27
- Redmond- July 28
- La Grande- July 30
- Coos Bay- August 4

The purpose of the meetings was to gather feedback from employers, service providers and other stakeholders regarding the draft goals of the Oregon Workforce Investment Board's strategic plan, and to assist Local Workforce Boards in development their subsequent strategic plans. Approximately 465 individuals participated in the forums statewide and attendees included employers, state legislators, county commissioners and other locally elected officials, community college presidents and administrators, representatives of Oregon's tribal communities, local social service providers, local workforce service providers, staff of local workforce boards, state workforce staff and others.

The agenda for the forums varied somewhat between locations based on local needs. However, the format for the forums remained relatively consistent. Attendees sat in table groups of six to eight, and following introductions, there was a brief presentation. The presentation included a summary of feedback from the Future of WorkSource forums held in Spring 2014; a description of federal, state and local changes that had occurred since that time; an update on the state's employment picture; and a brief description of changes resulting from the new federal Workforce

Innovation and Opportunity Act. At the end of the presentation, the Oregon Workforce Investment Board's (OWIB's) four draft strategic goals were shared.

The four draft goals were:

1. Create a simple, easy to access, demand-drive workforce system that inspires and empowers all Oregonians to build skills and accelerate career momentum.
2. Business and industry looks to the Oregon workforce system to deliver relevant, qualified and viable candidates.
3. To unite workforce, economic development and education to contribute to a thriving business economy in Oregon.
4. To create a workforce system that is customer-centric, easy to access, highly effective, and simple to understand.

Table groups were asked to select one goal and answer the following question, "What will look different in five years" if we are successful in achieving this goal? Groups discussed the question for approximately 20-25 minutes, and were then asked to identify from among all thing things they had listed, the one or two items they deemed most critical or which needed to happen first. At this point in the agenda, employers and other stakeholders who needed to leave were excused. Where necessary, tables were then consolidated to assure a sufficient number at each table for robust conversation.

Table groups were then asked to consider four additional questions about the goal they had selected:

1. What do you think of this goal?
2. What would the goal look like locally if we were highly successful?
3. Are there local strategies you think could effectively move us toward this goal?
4. What policies or practices create the conditions for achieving these goals locally, and how can we do more of that?
5. What new or improved coalitions or partnerships are needed to achieve these goals locally?

At five of the forums, the forum concluded at this point. For the forums in the four new local workforce areas (Lincoln City, Redmond, La Grande, and Coos Bay), the forum continued. In these areas, a more detailed presentation about the Workforce Innovation and Opportunity Act was provided, and then attendees were asked to

participate in an exercise to support innovative thinking around how to best serve Oregonians. In the exercise, participants were asked to imagine that it was the year 2020 and the local workforce board was receiving a Presidential Award for doing the best job nationally at putting people into job training. They were asked to prepare an acceptance speech from the perspective of being a group of job seekers, employers, or Governor’s Office staff. The presentations were fun, and more importantly, showed creativity and innovation, exposing what might be possible moving into the future.

Summary of Feedback

Feedback about the Strategic Goals

Forum participants provided feedback directly on the OWIB’s draft strategic goals when answering the question, “What do you think of this goal?” Responses were remarkably consistent across all the forums, and are summarized below:

- The goals are similar to each other and have significant overlap, especially goals 1 and 4, and goals 2 and 3.
- The goals need to be clear enough in specificity that you can know if you have been successful in achieving them.
- Goal 1 is good, but too large and complex. Consider breaking it into two goals, or move parts of goal 1 to goal 4.
- Goal 3 seems like the “lead” goal and should be first.
- There needs to be a goal specifically addressing youth.
- Goal 3 needs to include “business” or “employers” as a partner in building a thriving business economy.

Descriptions of the Future

Participant groups were asked to select one of the four goals, and respond to the question, “What will look different in five years” if we are highly successful in achieving this goal. A summary of those responses follows:

Goal #1

Create a simple, easy to access, demand-drive workforce system that inspires and empowers all Oregonians to build skills and accelerate career momentum.

Partnerships need to be large and inclusive and include greater involvement of business and education, especially K-12. Shift the perception of

WorkSource as a “crisis center” to include more highly skilled jobs and job seekers with services relevant to their needs.

Available resources include a wide array of federal, state, and local assistance programs that focus on removing barriers and not just building skills. Services are available 24/7 including simple on-line tools and apps with single sign-on and common assessments across programs. Learning is integrated with career pathways and OJTs are abundant and begin earlier, including in K-12.

Utilize faith-based organization’s facilities for workforce services as they are locally distributed, have established trust relationships with the community, and are available during the week.

Goal #2

Business and industry looks to the Oregon workforce system to deliver relevant, qualified and viable candidates.

The workforce system is the resource of choice for businesses looking for qualified candidates. It is the “go to” place for workforce solutions. All workforce agencies and partners speak to business with one voice and the resources and value of the system are better marketed. Employers have resources and funding to train their employees and invest money and time in the development of current and future workers through job training and internships.

The workforce system better understands employer needs on a statewide basis and from an individual employer perspective with increased clarity on the necessary employee skills sets and training required. Employer needs are captured through onsite visits, networking, and developing relationships through a consultative approach. Employers have clearly identified their needed skills and hire employees with the skills that match their need. There is a focus on the retention of businesses.

There is a continuum for developing skills starting in middle and high school and a link of skills to careers, especially in STEM. Intergenerational mentoring is a standard practice. Flexible training options are responsive to business needs and the economy, with an innovative approach to where the training takes place.

Data drives investments, continuous improvement, and accountability.

Goal #3

To unite workforce, economic development and education to contribute to a thriving business economy in Oregon.

System partners support each other's success, avoid duplication of efforts, and know what strengths each brings to the table. A strong, forward-thinking relationship exists between each local business community and their workforce system. There is stronger alignment with economic development.

Oversight of the workforce system by a single state agency facilitates transition from secondary education, earlier contextualized learning, vocational programming for high demand occupations with business/industry involvement. All partners operate under a common brand. Marketing happens with straightforward plain language that the general public understands.

Increased awareness and connection between employers and the system includes high schools, community colleges and economic development with a stronger alignment between K-20 and the needs of business. There are more volunteer, internship, and on-the-job training opportunities available, especially for youth. There is increased awareness and engagement with career counselors and increased focus on youth employment and connections to apprenticeships, volunteer opportunities, internships, OJTs and paid and unpaid work based learning. High school workforce programs focus on "earning and learning" and are connected to the talent needs of business. Digital badges certify soft skills.

Planning includes all partners and is proactive. A ten-year forecast includes anticipated skill needs. Use best practices, get "in front" of the economic cycle regarding demand for education and workforce services.

Fewer or looser regulations encourage business to grow and thrive. The system has more certainty around funding, and is technically streamlined.

Goal #4

To create a workforce system that is customer-centric, easy to access,

highly effective, and simple to understand.

There is clarity at the state level on expectations, coordination, alignment, resource sharing and service delivery. Integration and adaptability focus on meeting business and job seeker needs rather than individual services and programs. Employers have an increased perception of the value of the system, and are willing to be more engaged. There are incentives to work together.

The workforce system will have a simple registration process. It will be simple to use for both businesses and job seekers and have multiple access points through the use of technology. Multiple entry points serve as a launch pad for job seekers with little or no experience. Highly knowledgeable staff provide seamless services to job seekers and employers. Technology and personnel facilitate individualized outcomes for business and job seekers. A single data system across agencies allows staff to have a complete picture of the customer.

Focus on continuous process improvement with better customer feedback systems and a customer-based interactive navigation system.

Partners and Providers Build on Descriptions of the Future

After responding to question about what success would look like five years into the future, the participants were also asked to respond to four additional questions:

Question 2: What will that goal look like locally if we are highly successful?

Question 3: Are there local strategies you think could effectively move us toward this goal?

Question 4: What policies or practices create the conditions for achieving these goals locally, and how can we do more of that?

Question 5: What new or improved coalitions or partnerships are needed to achieve these goals locally?

What follows is a summary of the responses to each of the questions above for each of the four draft strategic goals. More detailed and verbatim transcriptions of the notes from the table discussed are available in the appendices to this report.

Goal #1: Create a simple, easy to access, demand-drive workforce system that inspires and empowers all Oregonians to build skills and accelerate career momentum.

Question 2

What will that goal look like locally if we are highly successful?

- WorkSource and the Workforce system is seen as a vital and necessary partner with business to provide good quality workers
- Partnerships with all education systems would be the norm
- Business needs would be met
- Youth would be educated and informed about career pathways and apprenticeships
- OJT and work place training would be available
- Industry, Education, and Training are truly joined and interconnected

Question 3

Are there local strategies you think could effectively move us toward this goal?

- Partnerships with other agencies
- Partnerships with business
- Use of OJT, Apprenticeships, and work based learning
- Marketing of programs to business and community
- Collaboration with K-12 and other Education providers

Question 4

What policies or practices create the conditions for achieving these goals locally, and how can we do more of that?

- Partnerships are increased, stake holders are involved
- Data and information is shared across programs and partners
- Policies are focused around helping build business
- Business are partners in the process
- Training is increased across the board
- There is a focus to bring youth into the system
- Local business and community organizations are utilized to build the system

Question 5

What new or improved coalitions or partnerships are needed to achieve these goals locally?

- Education at all levels, k-12, CC, Universities and all the sub groups
- Government, Service providers and all Workforce partners
- Nonprofits, including all volunteer agencies
- Business and Chamber organizations
- Employers
- Students and student groups

Goal #2: Business and industry looks to the Oregon workforce system to deliver relevant, qualified and viable candidates.

Question 2

What will that goal look like locally if we are highly successful?

- WorkSource is seen as the best place to go as a business and as a job seeker
- Education is better aligned and involved in the Workforce System
- Communication is improved between all partners
- Trust and cooperation are the norm
- Trainings are more in line with business needs
- The workforce system builds a pool of qualified candidates
- Communities grow and thrive, keeping youth within the community

Question 3

Are there local strategies you think could effectively move us toward this goal?

- Partnerships with other agencies
- Business services, outreach, customized recruitment
- Using sector strategies
- Education at all levels working together with the Workforce System
- Improved leadership teams
- Targeted training based on employers
- Using Local WF Boards and other business groups to increase awareness, marketing of the WF System

Question 4

What policies or practices create the conditions for achieving these goals locally, and how can we do more of that?

- Including business in the process as much as possible
- Co-location and WIOA as a process for bringing agencies together
- Training of WSO and partner staff on all partners, the work and who are the experts
- Keep decisions as local as possible
- Remove barriers between agencies, use common practices when possible
- Flexibility and quickness in response to business
- Increase the relationships with K-20
- Build better relationship with Economic Development

Question 5

What new or improved coalitions or partnerships are needed to achieve these goals locally?

- Education, K-12, Community Colleges and Universities

- Business and all business groups
- Chambers and NGOs that are community service based
- Economic Development Agencies and Organizations
- WSO Partners and new Partners
- WSO Leadership
- Veterans groups
- Housing and Childcare
- Students in training programs
- Job Seekers can have some impact
- CTE Programs need to be aligned
- Foundations

Goal #3: To unite workforce, economic development and education to contribute to a thriving business economy in Oregon.

Question 2

What will that goal look like locally if we are highly successful?

- Business/sectors are thriving
- Systems and agencies are aligned
- Seamless service delivery to customers
- Rural areas using technology and partnerships to serve customers
- All areas using technology to improve customer service – live chat
- WorkSource is seen as the place to go for workforce solutions
- Unemployment is reduced – more job placements are made
- We will have effective feedback mechanisms from customers to improve outcomes
- All partners would be represented at WorkSource and have knowledge of each other

Question 3

Are there local strategies you think could effectively move us toward this goal?

- Co-location and integration under a single site was a strong theme.
- Include local high schools when convening workforce partners.
- A new workforce area believes formalizing partnerships through MOUs is a good strategy.
- Common measures for success, including integrated goals and performance outcomes.
- Conduct gap analysis to better understand the environment as planning begins.
- Communication and media effort at getting messages out: social media, peer, etc.
- We cannot over do the communication between organizations and people
- Work-based learning.

- Data-driven decision making.
- All inclusive local leadership teams that include workforce, econ dev and education
- Free education resources such as Kaplan, MIT, Code Oregon, Stanford.
- Stackable credentials
- Navigators to help support those in training to access support and other services.
- Involving and educating employers
- There must be a database or tool used for business engagement that all partners have access to and utilize.
- Employer/business buy-in

Question 4

What policies or practices create the conditions for achieving these goals locally, and how can we do more of that?

- Better involvement from businesses
- Broad communication and sharing of information (best practices)
- Partnership, not competition
- Build trust with each other
- Implement the WSO Standards
- Increasing CTE opportunities
- Increase partnership at the board and WSO Center level (inclusive)

Question 5

What new or improved coalitions or partnerships are needed to achieve these goals locally?

- Most areas identified K-12, Chambers, CTE, faith-based organizations
- Several comments about shared systems, outcome-focus and creating a common language

Goal #4: To create a workforce system that is customer-centric, easy to access, highly effective, and simple to understand.

Question 2

What will that goal look like locally if we are highly successful?

- Business/sectors are thriving
- Systems and agencies are aligned
- Seamless service delivery to customers
- Rural areas using technology and partnerships to serve customers
- All areas using technology to improve customer service – live chat
- WorkSource is seen as the place to go for workforce solutions
- Unemployment is reduced – more job placements are made

- We will have effective feedback mechanisms from customers to improve outcomes
- All partners would be represented at WorkSource and have knowledge of each other

Question 3

Are there local strategies you think could effectively move us toward this goal?

- Need leadership from state and federal stakeholders
- Need the support and leadership from local workforce boards, board presidents and board executive directors
- Implement the WSO Standards
- Single, electronic, share data system
- Convene the key workforce partners to act
- Increase participation of the K-20 system
- Communication to the system about the system

Question 4

What policies or practices create the conditions for achieving these goals locally, and how can we do more of that?

- Increase representation of partners at the local workforce board level
- Conduct gap analysis to identifying partners not currently at the table
- One electronic tracking system
- Co-location and real integration

Question 5

What new or improved coalitions or partnerships are needed to achieve these goals locally?

- Greater focus on serving youth
- Stronger relationship with K-20
- Wide recognition that more partners should be involved at the board level

Conclusion

The feedback provided by forum participants provides useful and forward looking insight into both the OWIB's draft strategic goals, as well as the potential future that is possible to create by pursuing the goals. A clear vision of the future is essential to creating the changes that will allow Oregon's workforce development system to better serve its business and job seeking customers. This input is helpful to both the Oregon Workforce Investment Board as it works to define the statewide goals through its strategic plan, and also for the state's nine Local Workforce Boards. New opportunities are identified, new partnerships called out, and program and policy challenges and opportunities are illuminated.

In addition to the summaries of the feedback provided in this Comprehensive Report, more detailed and verbatim transcripts of the feedback is provided in the appendix to this report.

Thanks and Acknowledgements

Many people contributed to the success of the 2015 Workforce Development Community Forums. Local Workforce Boards were key to assuring local representation at each forum and attendees gave freely of their time and expertise. In addition, the following individuals deserve thanks and recognition for their contributions:

| | | | |
|------------------------|--|--|--|
| OWIB Manager | Melissa Leoni | | |
| Planning and Logistics | Katelyn Roberts | | |
| Co-Facilitators | Paul Hill and Shalee Hodgson | | |
| WIOA Presentation | Kurt Tackman | | |
| Feedback Analysis | Frank Brown and Robert Brown | | |
| Table Scribes | Katelyn Roberts Robert Brown Dave Allen Shaun Engstrom Melissa Leoni Jordana Barclay Jill Cuyler Debra Rask Stephanie Smolen | Kurt Tackman Frank Brown Jim Booker Aurora King Jennifer Denning Kristin Kahler Jones Tracy Calderon Amy Vandervliet Wayne Fanno | Todd Nell Jaime Clarke Laura Lausmanm Tom Previs Greg Ivers Adalberto Rubio David Spracklen Sonia Limon |

**SUPPORTIVE SERVICES AND NEEDS RELATED PAYMENTS POLICY****Purpose**

The purpose of this policy is to provide guidance for the provision of supportive services and needs-related payments to youth, adults, and dislocated workers in Jackson and Josephine Counties participating in Workforce Innovation & Opportunity Act (WIOA) funded programs in compliance with federal and state laws, regulations, policies and guidance.

Requirements

The Workforce Innovation and Opportunity Act (WIOA) provides program guidelines for supportive services for adults and dislocated workers defined in WIOA Sections 3(59) and 134(d)(2) and (3). These include services such as transportation, child care, dependent care, housing, and assistance with uniforms and other appropriate work attire and work-related tools, including such items as eye glasses and protective eye wear. It also includes needs related payments (NRP's) needed to enable individuals to participate in WIOA Title I activities. Supportive services for youth, as defined in WIOA Section 129(c)(2)(G), can additionally include assistance with educational testing, reasonable accommodations for youth with disabilities, and referrals to health care.

Scope

This policy applies to staff and all contractors, grantees, sub-grantees, and any other authorized provider of WIOA funds.

Policy

Supportive Services may be provided to enable an individual to participate in WIOA activities. Participants must be enrolled in a WIOA program, (individualized or training level services), in order to receive supportive services. The justification and documentation for all supportive services must be included in electronic and hard copy participant records.

Supportive Services are intended to be provided in situations where a participant would otherwise be unable to successfully participate in WIOA-authorized activity. Supportive Services will be provided on a case-by-case basis only when determined necessary and reasonable through a needs-based analysis, and dependent on funds availability.

Supportive Services are not intended to take the place of public assistance and income maintenance payments provided by social service agencies, and should only be utilized when it has been determined that other sources or services outside WIOA are not available to the participant, including all local workforce partners, community services providers, and other public and/or private agencies. Provision of supportive services will be coordinated with these organizations, when appropriate.

Documentation

Documentation for each supportive service payment must be maintained in the participant file, including:

- Type of supportive service;

- Date the supportive service was provided;
- Amount/value of the purchase;
- Proof of purchase that can be tracked back to the provider's general accounting ledger; and
- Documentation that the payment was received by the participant (for non-check items such as bus passes and gift cards).

Providers will develop procedures for distribution and provision of supportive services that must include:

- Internal controls that result in equitable treatment of participants;
- Documentation requirements, compliant with Rogue Workforce Partnership policies, standards and guidance; and
- Assurance of coordination with and non-duplication of other community resources.

Limits may be established on all supportive services, including maximum amount of funding, length of time, and exceptions to the limits on supportive services given availability of funds.

Allowable Supportive Services

- Transportation Assistance
- Child care
- Dependent Care
- Housing
- Needs-Related Payments (defined below)
- Other supportive services (such as work-related clothing or tools) as determined by the provider and approved by Rogue Workforce Partnership.

Transportation Assistance: includes gas cards, bus passes, emergency car repair, driver licenses, and vehicle registration, and can be issued to participants in ongoing job search, training, or employment activities.

Child Care: child care services payments will only be made to state registered child care facilities or providers and will be reimbursed for a determined number of hours based upon WIOA activities and at the hourly rate established by Oregon Department of Human Services Self Sufficiency Division. This shall not include more than one hour of travel time to a training site per day. The participant is liable for any child care costs incurred over and above the amount authorized by the WIOA program.

Dependent Care: dependent care will be subject to the same hour limitations as child care and all other limitations of these support service guidelines. Dependent care must be provided by licensed or certified providers.

Housing: housing support payments are provided to retain housing stability to participants in order to allow them to participate in WIOA approved activities. WIOA programs are encouraged to coordinate with local agencies and social service organizations whenever possible.

Needs-Related Payments

Needs-Related Payments (NRPs) are financial supports that may be made available to eligible Adult or Dislocated Worker participants who are enrolled in a training program, but will be unable to participate in or complete an approved training program without such assistance. NRPs are one of the supportive services authorized by WIOA and are intended to provide cash assistance to participants with necessary, non-training related expenses. This assistance would be contingent upon the availability of funds and the number of requests received. Rogue Workforce Partnership staff must approve all NRPs prior to being provided and may limit or eliminate the availability of NRPs, at its sole discretion, at any time based on funding availability. NRPs should be provided when it is determined that ongoing resources and income from all other sources are not adequate to support the participant while in WIOA-approved training.

To qualify, a participant must:

1. Meet the eligibility requirements.
2. Be enrolled in an eligible training program within required timeframes (under WIOA section 134).
3. Be unemployed and have not qualified for or exhausted their unemployment compensation.
4. Not have been disqualified from receiving unemployment insurance benefits because of fraud or overpayments, and must have received unemployment insurance benefits within the last 12 months.

Participants who qualify may be eligible to receive NRPs for up to 52 weeks, at an amount not to exceed the participant's most recent weekly unemployment insurance benefit amount at the time the participant exhausted their weekly benefit. For participants who did not qualify for unemployment compensation, the weekly payment level may not exceed an amount above the federal poverty level for an equivalent period.

If NRPs are provided, in addition to the documentation requirements outlined above, WIOA programs will develop internal protocols that establish attendance and academic standards for payments to continue and how this will be verified, as well as the number of hours/credits a participant be registered for in order to remain eligible for NRPs. Verification of eligibility, evidence of participation in training, attestation of a participant's understanding of NRP requirements, and compliance with established attendance/academic standards for payment must be described in developed procedures and included in the participant file.

Disallowed Supportive Services

Fines, late fees, interest payments and other costs resulting from penalties and/or sanctions are not allowable supportive services. Supportive services cannot be provided for participant expenses that occurred prior to enrollment in WIOA programs. This includes such items as late car insurance payments or bills for household support that were due to be paid prior to the enrollment date or for services provided or items purchased prior to enrollment.

Re-Enrollment

Former participants who re-enroll shall be eligible for all Supportive Services; however, no participant shall be re-enrolled expressly for the purpose of obtaining Supportive Services.

The Rogue Valley's Healthcare Workforce

Meeting Demand through Collaboration and Innovation



ROGUE WORKFORCE PARTNERSHIP



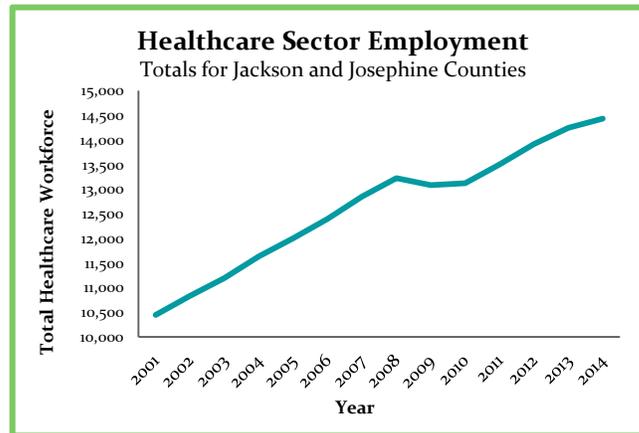
Since 2012, Rogue Valley healthcare professionals have joined forces with workforce development partners and educators to create the Rogue Workforce Partnership’s Healthcare Workforce Steering Committee, in order to address the workforce needs of the region, and align the workforce development and education systems of the Rogue Valley to meet those business-driven needs. This is a brief snapshot of the demand, the collaborative intervention, and the resulting improvement in our region’s healthcare workforce pipeline.

The Demand

Our region’s healthcare workforce has been growing rapidly for the past decade, and after a modest leveling during the recession, growth in the sector is back to pre-recession rates.

Workforce pipeline needs identified by healthcare sector leaders in 2012 included:

- CNA & CNA II
- Certified Caregivers
- Physical Therapy Assistants
- Occupational Therapy Assistants
- Clinical Lab Assistants
- Home Healthcare Workers
- Nurses/RNs
- Speech Therapists
- Surgery Technicians
- Data-Driven Performance Management Training
- Leadership/Management Training
- Licensed Practical Nurses



Rogue Valley Healthcare Occupations · 2012-2022 Projected Openings

(Rank is based on Oregon Employment Department’s Prioritization for Training algorithm. Vacancies based on 2013 labor market snapshot survey.)

| Occupations | Total Projected Openings | 2014 Median Wage | Rank | 2013 Vacancies |
|---|--------------------------|------------------|------|----------------|
| Physical Therapists | 100 | \$79,186 | 1 | 16 |
| Medical & Health Services Managers | 86 | \$103,688 | 2 | 5 |
| Nursing Assistants | 417 | \$27,893 | 6 | 47 |
| Nurse Practitioners | 49 | \$109,325 | 6 | 9 |
| Physician Assistants | 47 | \$104,000 | 6 | 5 |
| Medical & Clinical Laboratory Technologists | 45 | \$72,426 | 6 | 8 |
| Physicians & Surgeons | 214 | N/A | 14 | 0 |
| Medical & Clinical Laboratory Technicians | 29 | \$57,549 | 23 | 3 |
| Physical Therapist Assistants | 23 | \$56,077 | 23 | 5 |
| Registered Nurses | 834 | \$78,936 | 35 | 199 |
| Pharmacists | 101 | \$125,570 | 35 | 4 |
| Healthcare Social Workers | 43 | \$64,418 | 46 | 4 |
| Home Health Aids | 376 | \$23,434 | 65 | 112 |
| Substance Abuse & Behavioral Disorder Counselors | 31 | \$35,880 | 65 | 6 |
| Healthcare Practitioners & Technical Workers | 22 | \$89,586 | 65 | 2 |
| Surgical Technologists | 26 | \$43,410 | 87 | 8 |
| Nurse Midwives | 9 | \$108,992 | 87 | 0 |
| Medical Secretaries | 552 | \$31,179 | 145 | 2 |
| Licensed Practical and Licensed Vocational Nurses | 87 | \$47,726 | 145 | 4 |
| EMT & Paramedics | 71 | N/A | 145 | 5 |
| Radiologic Technologists | 71 | \$59,363 | 145 | 8 |
| Healthcare Support Workers, All Other | 55 | \$34,299 | 145 | 4 |
| Physical Therapist Aides | 33 | \$24,357 | 145 | 2 |
| Dental Laboratory Technicians | 21 | \$38,979 | 145 | 0 |
| Ophthalmic Medical Technicians | 8 | \$35,464 | 145 | 3 |
| Radiation Therapists | 6 | N/A | 145 | 2 |
| Occupational Therapy Assistants | 5 | N/A | 145 | 0 |
| Dental Hygienists | 116 | \$80,267 | 207 | 0 |
| Mental Health Counselors | 55 | \$49,192 | 207 | 0 |
| Health Technologists & Technicians, All Other | 34 | \$42,245 | 207 | 0 |
| Respiratory Therapists | 30 | \$57,408 | 207 | 11 |
| Dentists, General | 19 | N/A | 207 | 0 |
| Diagnostic Medical Sonographers | 16 | \$81,307 | 207 | 2 |
| Optometrists | 9 | N/A | 207 | 0 |
| Nuclear Medicine Technologists | 5 | N/A | 207 | 0 |
| Audiologists | 3 | N/A | 207 | 0 |
| Podiatrists | 3 | N/A | 207 | 0 |
| Medical Assistants | 350 | \$33,134 | 268 | 5 |
| Medical Records & Health Information Technicians | 85 | \$33,862 | 268 | 5 |
| Phlebotomists | 40 | \$32,739 | 268 | 9 |
| Psychiatric Aides | 14 | N/A | 268 | 0 |
| Ophthalmic Laboratory Technicians | 8 | N/A | 268 | 0 |
| Hearing Aid Specialists | 6 | N/A | 268 | 0 |
| Therapists, All Other | 2 | N/A | 268 | 0 |
| Dentists, All Other Specialists | 4 | N/A | 350 | 0 |

Data Source: Oregon Employment Department (<https://www.qualityinfo.org/>)

Workforce Solutions to Meet Demand

Key Interventions

- ▶ RCC wrote and received a \$3,000,000 U.S. Department of Labor grant to train healthcare workers to meet identified demands, including: Physical Therapy Assistants, Occupational Therapy Assistants, Clinical Lab Assistants and Certified Nurse NA I & II's.
- ▶ Joan Eberling, an original member of the Steering Committee, decided to move from her position as Director of Nursing at Fairview Transitional Health Center to start Pacific Healthcare Training to fill the unmet need for additional CNA training capacity.
- ▶ The Job Council developed a healthcare pre-employment program to prepare job-seekers in the foundational skills needed to pursue training and employment in the field.
- ▶ Southern Oregon University created the Innovation & Leadership Degree (Bachelor of Science), a multidisciplinary degree completion program for professionals with at least 5 years of work experience.
- ▶ RWP reconvened a Nursing Workforce Subcommittee, in partnership with NWone, to address specific nursing workforce issues, needs and solutions.
- ▶ Nursing and other healthcare programs at RCC, OHSU/SOU and Oregon Tech continued to maximize capacity in preparing students to meet demand.
- ▶ Rogue Workforce Partnership provided a new screening tool known as the National Career Readiness Certificate, as part of the Governor's Certified Work Ready Communities Initiative, which is being utilized by healthcare employers.

Workforce Pipeline Solutions

The Job Council / WorkSource Oregon Centers

- ▶ Healthcare Pipeline Program (5-steps)
 - Healthcare Career Learning Tours
 - Access to Scholarships for CNA I Training
 - Entry-Level Job Search Assistance
 - Access to Training Scholarships for CNA II (After at least 6 months experience following CNA I)
 - CNA II Job Search Assistance
 - So far, this program has provided training scholarships for more than 350 job seekers, in order to provide an entry point and ongoing support to dislocated workers seeking a healthcare career path.
- ▶ National Career Readiness Certificate (NCRC)

Private Occupational Training Providers

Abdill Career College

Certificate of Completion programs: Medical Assistant, Dental Assistant, Limited X-Ray Technician, Medical Front Office Management, Phlebotomy Technician, and Pharmacy Technician.

- Approximately 100-120 Graduates per Year

Pacific Healthcare Training

An Oregon State Board of Nursing approved CNA I and CNA II training facility. (First Graduating Class was May 2013.)

- Approximately 800-1000 total graduates to date
 - 560-760 CNA I Graduates
 - 240 CNA II Acute Graduates

Rogue Workforce Partnership Healthcare Workforce Steering Committee's Purpose:

"Healthcare industry leaders have joined together to comprehensively coordinate healthcare education and workforce issues for our region. The partnership seeks to establish a collaborative relationship between local healthcare employers and a team of education, workforce, and economic development partners. This partnership generates responsive solutions to healthcare employers' hiring, staff development, and other related workforce training and education needs. The partnership believes that an industry-led, community-sponsored group can collectively address the workforce needs of the healthcare industry and benefit our Southern Oregon community."

Rogue Valley Healthcare Graduation Statistics

Rogue Community College

Adult Foster Care Certification, EMT Licensure, Emergency Medical Services, Paramedicine, Massage Therapy, Dental Assistant, Basic Health Care, Medical Assistant, Clinical Lab Assistant, Physical Therapy Assistant, Occupational Therapy Assistant, Community Health Worker Certification, CNA II, Nursing Assistant, Practical Nursing, and Nursing programs offered.

- 2013-2014: 354 Healthcare Program Graduates
- 2014-2015: 477 Healthcare Program Graduates
- 2015-2016: 514 Healthcare Program Graduates

Oregon Health & Science University Ashland/SOU Campus

Offers a Bachelor of Science with a Major in Nursing

- 2010: 45
 - 2011: 50
 - 2012: 49
 - 2013: 51
 - 2014: 48
 - 2015: 58
- 2013 Grad Snapshot:** 75% received initial employment in southern Oregon; and 86% are currently employed in Oregon
- 2014 Grad Snapshot:** 77% received initial employment in southern Oregon; and 90% are employed in Oregon

Oregon Institute of Technology

Offers Healthcare-related Bachelor Degrees: Applied Psychology, Biology-Health Sciences, Clinical Lab Science, Dental Hygiene, Diagnostic Medical Sonography, Echocardiology, EMT Paramedic, Nuclear Medicine Technology, Polysomnography, Radiologic Science, Respiratory Care, Vascular Technology, Population Health Management, and Marriage and Family therapy.

- Approximately 330 Graduates per Year

OHSU Klamath Falls/Oregon Tech Campus

Offers a Bachelor of Science in Nursing

- Approximately 25 Graduates per Year

Creating Win/Win/Win Situations for Southern Oregon's Healthcare Workforce:

Employers Win: healthcare organizations gain access to a better trained local applicant pool, reducing hiring failure and training costs

Educators Win: educational institutions attract more students by creating targeted programs based on the demands of local employers

Job Seekers Win: job seekers gain entry into a growing career path offering meaningful and gainful employment



INDIVIDUAL TRAINING ACCOUNT (ITA) POLICY

Purpose

The purpose of this policy is to establish guidelines for the issuance of individual training accounts for participants engaged in approved short-term training in compliance with federal and state laws, regulations, policies and guidance.

Requirements

Funding of certain Workforce Innovation and Opportunity Act (WIOA) Title I training services for adults, dislocated workers, and youth are provided through ITAs. Using ITA funds, WIOA Title I adults, dislocated workers, and youth purchase training services from eligible training providers they select in consultation with a Talent Development Specialist and a supervisor. Individuals are expected to utilize information that is provided as part of the required training scholarship application (e.g., skills assessment, labor market conditions/trends and training vendor performance) to take an active role in managing their employment future through the use of ITAs. Individuals are expected to make a self-informed choice about their own employment future and the training services needed.

Note: ITAs are allowed for out-of-school youth ages 18-24, per WIOA Section 129(c)(2)(D) and proposed 20 CFR 681.550. Out-of-school youth ages 16-17 are not eligible for ITAs

Scope

This policy applies to staff and all contractors, grantees, sub-grantees, and any other authorized providers of WIOA Title 1B, adult and dislocated worker training funds.

Policy

An Individual Training Account (ITA) is intended to provide opportunities for adults and dislocated workers to gain and sustain skills necessary for competitive employment by financing training services. WIOA program participants who are in need of training, and who can benefit from that training, may be offered an ITA in the form of a vocational scholarship. ITAs should be short-term in nature, and focused on skills relevant to job opportunities in the current economy that provide or lead to a self-sufficient wage. Qualifying training includes occupational skills training and registered apprenticeship program.

Individual training accounts support the achievement of skill enhancements as appropriate to applicant eligibility, the requirements of each funding stream and funding availability. Preference is given to individuals who have taken the NCRC and who are pursuing career options that fall within the region's sector strategies. At a minimum, the criteria for the award of a scholarship will utilize the region's "decision-making matrix," requiring a score of at least 5, and will consider:

- The connection between the employment goal of the applicant and regionally targeted high demand, high skill or high wage occupations, or strategic emerging industries identified within the local unified plan; or
- The connection between the employment goal of the applicant and a career pathway leading to self-sufficiency; and

- The connection between the training requested and the employment goal or career pathway of the applicant; and
- Whether the applicant is willing to re-locate to find employment if the employment goal of the applicant does not relate to the high demand growth, or wage occupation within the workforce area; and
- Whether the applicant has sufficient resources to successfully complete the training program, including Pell Grant and other sources of financial aid or resources; and
- The availability of resources to fund the scholarship; and
- The applicant demonstrates the necessary skills to complete the training and enter employment and has no legal barriers to entering the occupation for which the training is targeted

Rogue Workforce Partnership may add additional criteria and funding priorities.

A list of entities eligible to receive WIOA funds to provide training services to eligible adults and dislocated workers is established as the Eligible Training Provider List (ETPL). All entities receiving WIOA-funded ITAs must be on the ETPL, except when otherwise noted in CCWD Policy 589-30.6, and the exception has been approved by Rogue Workforce Partnership staff.



ROGUE WORKFORCE PARTNERSHIP

Growing Skills - Building Careers - Boosting the Economy

Action Brief

To: Rogue Workforce Partnership
From: Aurora King, Director of Business and Innovation
Date: September 23, 2015
Subject: Policy Update for On-the-Job Training

Background

The purpose of an On-the-Job Training contract (OJT) is to assist businesses in training and retaining skilled, productive workers. Through the OJT contract and training plan, occupational training is provided for the participant in exchange for the reimbursement of up to 50 percent of the wages paid during the training period. OJT's may be used to help train new employees, eligible current employees and employees hired to regular permanent employment through a staffing service relationship. This policy applies to staff and all contractors, grantees, sub-grantees, and any other authorized provider of Workforce Innovation and Opportunity Act (WIOA) Title 1B training funds, as well as all other funds allocated for On-the-Job Training.

Recommended Action

Staff recommends that the Rogue Workforce Partnership approve the attached amended OJT policy. WIOA legislation allows local boards to spend up to 20% of training funds on incumbent workers. This policy has been updated to allow for OJT employer training reimbursements to be made for incumbent workers.



ROGUE WORKFORCE PARTNERSHIP

Growing Skills - Building Careers - Boosting the Economy

ON-THE-JOB TRAINING POLICY

Purpose

To provide guidance for the (OJT) service activity for incumbent and transitioning workers in Jackson and Josephine Counties, funded under Workforce Innovation and Opportunity Act (WIOA) Title IB, as well other funds allocated for OJT's.

Requirements

Per WIOA section WIOA 134(c) (4)(A) i, Workforce Development Boards may use up to 20 percent of the funds allocated to the local area for incumbent worker training programs. Governing guidelines also include WIOA 134(c) (3)(D) ii federal statues as well as applicable state and local funding stream requirements for On-the-Job Training.

Scope

The purpose of an On-the-Job Training (OJT) contract is to assist businesses in training and retaining skilled, productive workers. Through the OJT contract and training plan, occupational training is provided for the participant in exchange for the reimbursement of up to 50 percent of the wages paid by the employer during the training period. OJT's may be used to help train new employees, eligible current employees and employees hired to regular permanent employment through a staffing service relationship. This policy applies to staff and all contractors, grantees, sub-grantees, and any other authorized provider of WIOA Title 1B training funds.

Policy

In accordance with the WIOA Act, funds for OJT's will be used for individuals in need of on-the-job skills training in order to secure new employment or to provide additional skills training to advance in their job or to prevent job loss. The required skills and business needs will be determined and appropriately documented on an individual basis prior to contractual agreement. The candidate's "skills gap" must be clearly articulated, including a plan for the delivery of training to the individual, as well as an evaluation process to ensure that training was delivered and a standard was met. These funds are provided as a wage reimbursement for up to 50% of the employee's wages, and are provided to the employer, or the employer's financial representative, upon completion of the training agreement.

Employers will be reimbursed at \$3,500 per OJT, and at the discretion of RWP staff, in coordination with appropriate contractor staff, to approve up to \$5,000 for higher wage/higher skills training opportunities. The following criteria apply to the implementation of an OJT whereas the employment position:

- Has a wage of at least \$10.00 per hour;
- Is at least 30 work hours or more per week;
- Offers benefits to the employee. (If no medical benefits are offered, it's preferred that the job pay at least \$11.00 per hour.)
- Has a training period for no less than 4 weeks and no more than 26 weeks (or six months) and;
- Is preferred to be an in-demand industry sector or occupation that falls in the local region's sector strategies, which include Advanced Manufacturing, Information Technology, Electronic Commerce, Healthcare, or as determined to be in demand by the support of local labor market information.

Incumbent workers must also, as a result of successfully completing the OJT:

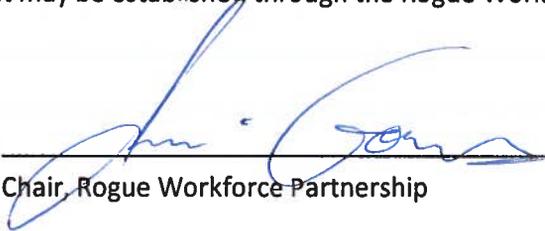
- Expect a wage gain of at least \$1.00 per hour or more by the end of the training period or sooner; and
- Expect an upgrade to a new position with a different scope of work and title; or
- A case-by-case exception is granted by the contractor. Examples of exceptions might include (but are not limited to) a worker who has a disability and requires retraining; medical benefits and regular employment status are gained as a result of the training; or a layoff can be averted through retraining.

Additional preference includes the following:

- Employer will “backfill” with a new hire for the employee’s previous position through the WorkSource Oregon Center when training is complete; or
- Employer offers concurrent skill building opportunities for the employee to access, such as PowerUp Academy trainings, any short-term occupational skills trainings at Rogue Community College, or through ResCare Academy online; or
- Employer has demonstrated a good “track record” with utilizing WorkSource Oregon programs; or
- Business falls within a “traded-sector” industry; or
- Business has demonstrated growth and an increase in revenue.

For other discretionary grant projects that provides OJTs as a training opportunity, a different hourly wage gain requirement may be established through the Rogue Workforce Partnership for the project.

APPROVED: _____


Chair, Rogue Workforce Partnership

ADOPTION DATE: _____

9/23/15



ROGUE WORKFORCE PARTNERSHIP

Growing Skills - Building Careers - Boosting the Economy

Action Brief

To: Rogue Workforce Partnership

From: Aurora King, Director of Business and Innovation

Date: September 23, 2015

Subject: Workforce Innovation and Opportunity Act (WIOA) Policy for Incumbent Worker Training

Background

The purpose of incumbent worker training is to meet the needs of employer(s) to retain a skilled workforce or avert the need to lay off employees. Per WIOA section 134(c) (4)(A) i, Workforce Development Boards may reserve and use up to 20 percent of the funds allocated to the local area for incumbent worker training programs. The attached policy applies to staff and all contractors, grantees, sub-grantees, and any other authorized of WIOA Title 1B incumbent worker training funds in Region 8.

Recommendation

Staff recommends that the Rogue Workforce Partnership approves the attached incumbent worker policy which requires a non-Federal share of cost from the employer. The employer may provide the share in cash, or in-kind, and is to be fairly evaluated by Rogue Workforce Partnership.

Preference will be given to incumbent worker trainings that fall within these categories:

- a. An in-demand industry sector or occupation (that has a substantial current or potential impact through jobs that lead to economic self-sufficiency and opportunities for advancement),
- b. The local region's sector strategies, which include Advanced Manufacturing, Information Technology, Electronic Commerce, Healthcare, or
- c. For jobs as determined to be in demand by the support of local labor market information.

Additional preference includes the following criteria:

- a. If the training allows an incumbent worker to move into another position, and the employer will "backfill" with a new hire for the employee's previous position through the WorkSource Oregon Center when training is complete;
- b. Employer has demonstrated a good "track record" with utilizing WorkSource Oregon programs;
or
- c. Business has demonstrated growth and an increase in revenue.

Recommended Action

That the Rogue Workforce Partnership approves the attached incumbent worker training policy.



INCUMBENT WORKER TRAINING POLICY

Purpose

To provide guidance for the Workforce Innovation and Opportunity Act (WIOA) Incumbent Worker Training service activity for incumbent workers in Jackson and Josephine Counties.

Requirements

Per WIOA section 134(c) (4)(A) i, Workforce Development Boards may reserve and use up to 20 percent of the funds allocated to the local area for incumbent worker training programs. Governing guidelines also include federal statutes, as well as applicable state and local funding stream requirements for Incumbent Worker Training.

Scope

Incumbent Worker Training shall be carried out by Contractor and overseen and monitored by the Rogue Workforce Partnership for the purpose of assisting incumbent workers in obtaining the skills necessary to retain employment or avert layoffs. This policy applies to staff and all contractors, grantees, sub-grantees, and any other authorized provider of WIOA Title 1B incumbent worker training funds in Region 8.

Policy

In accordance with the WIOA Act, Contractor will use funds for training designed to meet the special requirements of an employer (or group of employers) to retain a skilled workforce or avert the needs to lay off employees. This will be accomplished by assisting workers in obtaining the skills necessary to retain employment, and conducted with a commitment by the employer to retain or avert laying off incumbent worker(s) that are trained in order to increase the competitiveness of the employee and/or employer.

When determining eligibility, Contractors shall take into account:

- a. The characteristics of the potential participants in the program;
- b. The relationship of the training to the competitiveness of a participant and the employer;
- c. The number of employees participating in the training;
- d. The wage and benefit levels of those employees at present and anticipated upon completion of the training, and
- e. The existence of other training resources and advancement opportunities provided by the employer.

Employers participating in the program carried out under this policy shall be required to pay for the non-Federal share of the cost of providing the training to incumbent workers of the employers. The Rogue Workforce Partnership shall establish the non-Federal share of such cost (taking into consideration the factors listed in the previous paragraph). The non-Federal share shall not be less than:

- a. 10 percent of the cost, for employers with not more than 50 employees;
- b. 25 percent of the cost, for employers with more than 50 employees, but not more than 100 employees; and
- c. 50 percent of the cost, for employers with more than 100 employees.

The calculation of the non-Federal share provided by an employer participating in the program may include the amount of the wages paid by the employer to a worker while the worker is attending a training program funded through WIOA. The employer may provide the share in cash, or in-kind, and is to be fairly evaluated by Rogue Workforce Partnership.

Preference will be given to incumbent worker trainings that fall within these categories:

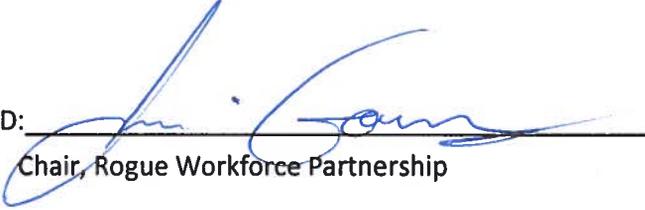
- a. An in-demand industry sector or occupation (that has a substantial current or potential impact through jobs that lead to economic self-sufficiency and opportunities for advancement),
- b. The local region's sector strategies, which include Advanced Manufacturing, Information Technology, Electronic Commerce, Healthcare, or
- c. For jobs as determined to be in demand by the support of local labor market information.

Additional preference includes the following criteria:

- a. If the training allows an incumbent worker to move into another position, and the employer will "backfill" with a new hire for the employee's previous position through the WorkSource Oregon Center when training is complete;
- b. Employer has demonstrated a good "track record" with utilizing WorkSource Oregon programs; or
- c. Business has demonstrated growth and an increase in revenue.

For other discretionary grant projects that provides OJTs as a training opportunity, a different hourly wage gain requirement may be established for the project through Rogue Workforce Partnership.

APPROVED: _____


Chair, Rogue Workforce Partnership

ADOPTION DATE: _____

9/23/15

Request for Proposal - WorkSource Oregon Centers of the Rogue Valley Evaluation & Selection Criteria

A. Organization's Leadership Capacity & Philosophy

- Organization's management style, culture & philosophy.
- Ability to build and sustain relationships with multiple funding organizations with complex overlapping and divergent goals.
- Capacity to innovative services to meet the needs of job-seekers and demanding employers.
- Experience and ability to build community partnerships and leverage additional resources.
- Experience and ability to effectively manage programs that address the needs of low-income, diverse populations and the complex issues related to poverty, disability and related life challenges.

B. Program Design & Delivery

- Ability to produce great outcomes in either WIOA, TANF/JOBS or other work and training programs.
- Demonstrated capacity in staff development and training.
- Demonstrated ability to engage and partner with business and industry, and innovate program design based on feedback and business customer needs.
- Demonstrated ability to engage and partner with job-seekers, and innovate program design based on feedback and business customer needs.
- Demonstrated ability to assess the range of job-seekers to ensure that they receive appropriate services in accordance with their own priorities and readiness for entering the workforce.
- Demonstrated ability to have staff have weave together an integrated service delivery model for different populations of job-seekers to promote and support continuous participant engagement in appropriate services.
- Demonstrated ability to engaged and deliver services to underserved populations and populations with historically high unemployment rates.
- Demonstrated ability to create a learning environment among staff and customers.
- Demonstrated ability to learn from mistakes.
- Demonstrated ability to create motivation and accountability among customers.

C. Budget / Administrative Capacity

- Strong financial management system and demonstrated capacity to manage public funds.
- Demonstrated internal monitoring and oversight capacity to ensure that funds are spent on the reasonable, necessary, allowable and allocable cost.
- Demonstrated capacity to find cost savings and deliver quality services more cost effectively.
- Ability to negotiate on key budget items such administrative rate, cost of central administration, profit, fringe rate, etc.

D. References contacted - to verify aspects of your organization's leadership, innovation, program design and delivery, customer service and administrative capacity.



**PARTNERSHIP AGREEMENT BETWEEN THE
ROGUE WORKFORCE PARTNERSHIP
AND THE
ROGUE VALLEY WORKFORCE CONSORTIUM**

1. PARTIES

This Agreement is between the Rogue Workforce Partnership (its “RWP Board of Directors” and its subcommittee the “Workforce Board”), and the Rogue Valley Workforce Consortium (RVWC), hereinafter collectively referred to as the “parties.”

2. WORKFORCE BOARD RESPONSIBILITIES

The Workforce Board shall:

- A. Develop and approve the Rogue Valley workforce area’s strategic workforce plan for submission to the governor and approve the annual workforce budget, subject to the approval of the RVWC;
- B. Establish standards for and oversee the Rogue Valley’s workforce system, subject to the terms of a Memorandum of Understanding (“MOU”) executed with partner agencies;
- C. Perform other workforce board duties as required by the Workforce Innovation and Opportunity Act of 2014 (“WIOA”), the State of Oregon, Federal and State of Oregon grant agreements, other applicable Federal, State and local laws, rules and agreements and this Partnership Agreement;
- D. Adopt bylaws, which shall be consistent with this agreement; and,

3. RWP DIRECTORS (BOARD OF DIRECTORS) RESPONSIBILITIES

RWP Directors shall:

- A. Remain a nonprofit Oregon corporation in good standing with Federal tax exempt status;
- B. Serve as the Rogue Valley workforce area’s local grant recipient and administrative entity as so designated by the RVWC;
- C. Hire, evaluate and employ the Rogue Workforce Partnership’s Executive Director and other staff;

- D. Provide staff support for the Workforce Board, RWP Directors and RVWC;
- E. Develop the annual workforce budget for approval by the RVWC, RWP Directors and Workforce Board
- F. Manage workforce expenditures in accordance with the approved workforce budget and direction received from the Workforce Board, RWP Directors and RVWC;
- G. Adopt policies and procedures and establish administrative systems necessary to ensure accountability and compliance with Federal, State and local laws, rules, grant terms and agreements;
- H. Inform the Workforce Board, RWP Directors and RVWC on a regular basis of progress in achieving strategic goals and objectives, and deliver other reports to the Workforce Board, RWP Directors and RVWC as requested;
- I. Purchase insurance, to the extent it is available, to reasonably cover risks and liabilities;
- J. Solicit and accept public and private funds;
- K. Maintain strong linkages with local governments and local educational and economic development agencies;
- L. Procure and award workforce area contracts, make purchases and enter into leases as authorized by the budget;
- M. Establish and maintain a system for accurately tracking customers, services and accomplishments;
- N. Maintain a system to hear and resolve grievances and complaints brought by customers and other interested parties;
- O. Provide for independent comprehensive financial and compliance audits of all funds and accounts as required by grant agreements and by the Comptroller General of the United States. Audit costs shall be Rogue Workforce Partnership's responsibility. Copies of audit and monitoring reports shall be furnished to the Workforce Board, RWP Directors and RVWC;
- P. Appoint RWP Workforce Board business or economic development representatives to serve as members of RWP Board of Directors. These appointments shall include the Workforce Board Chair, Vice Chair and immediate past chair. The Chair and Vice Chair of the RWP Directors shall serve as the Chair and Vice Chair of the Workforce Board.
- Q. Comply with all applicable Federal, State and local laws, rules, policies and procedures. In the event liability for Rogue Valley's workforce expenditures or operations occurs, the following priorities shall apply:
 - i. First Priority: Rogue Workforce Partnership shall attempt to recover funds from the contractor, agent for third party causing the liability:

- ii. Second Priority: Rogue Workforce Partnership shall attempt to recover funds from an insurance carrier or bond issuer;
- iii. Third Priority: Rogue Workforce Partnership shall attempt to obtain a waiver of liability or offset liability against current or future grant revenues;
- iv. Fourth Priority: Rogue Workforce Partnership shall repay the liability utilizing the contingency fund established for this purpose.

4. RVWC RESPONSIBILITIES

RVWC shall:

- A. Appoint Workforce Board members;
 - B. Review and approve the Rogue Valley workforce area's strategic workforce plan for submission to the governor and approve the annual budget, including major modifications thereto;
 - C. Designate the grant recipient and administrative entity of the workforce area; and
 - D. Perform oversight and other responsibilities assigned to local elected officials pursuant to WIOA, State of Oregon laws, policies and grant agreements and the RVWC intergovernmental agreement.
5. CODE OF CONDUCT: RWP Directors, Workforce Board, and RVWC shall mutually agree upon and adopt a Code of Conduct covering all Rogue Valley workforce area activities and expenditures.
6. DISPUTE RESOLUTION: If a dispute arises between the parties, the Workforce Board and the RVWC shall each select two members to meet and attempt to resolve the dispute. The meeting shall be chaired by a neutral party who may be a hearing officer selected by the Oregon Employment Department. The neutral chair may make a motion and call for a vote if a mutually agreed upon resolution cannot be reached and the neutral chair shall, in the case of a deadlock, cast the deciding vote. The decision shall be binding upon the Workforce Board, Rogue Workforce Partnership and RVWC.

7. REBRANDING

The Rogue Workforce Partnership and RVWC may elect to "rebrand" by changing their names. Any such change shall not invalidate this agreement and shall merely serve to substitute the new name for the name contained in this agreement

8. DURATION

This agreement shall take effect when authorized by the Workforce Board, RWP Directors and RVWC. Any of the parties may withdraw from this Agreement by giving advance written termination notice to the other parties on or before December 31st. Termination shall be effective at midnight of the following June 30th, the end of the workforce program year.

ROGUE VALLEY PARTNERSHIP AGREEMENT SIGNATURE PAGE

The parties agree to each of the terms of this Agreement by signing below.

Rogue Workforce Partnership Chair:

_____ Date: _____
Jessica Gomez

Rogue Valley Workforce Consortium Chair:

_____ Date: _____

Jackson County Board of Commissioners



Appoints 1 Commissioner to serve on R.V. Workforce Consortium

Josephine County Board of Commissioners



Appoints 1 Commissioner to serve on R.V. Workforce Consortium

Rogue Valley Workforce Consortium

- Serves as Chief Elected Official per WIOA
- Appoints Workforce Board members & approves Local Plan
- Both Commissioners serve on RWP Corporate Directors

Southern Oregon Success

- Cradle-to-Career, Collective Impact Initiative & Regional Achievement Collaborative (OR Dept. of Education)

College & Careers for All

- Integrates: STEM, CTE, Dual Credit, CRLE's, Industry Recognized Credentials, Career Pathways
- Partners: K-12, Higher Education, RWP, SOREDI, SVTG, Informal Education

Early Learning & Youth Development

- Wrap-around services for at-risk children, youth & families
- School, Health, Social Services & Community Partnerships, System of Care, etc.
- Adverse Childhood Experiences / Trauma Informed Care

College Dreams

- WIOA In-School Youth Services
- Other Youth Services



Oregon Department of Human Services



Self-Sufficiency Programs

- TANF - Temporary Assistance to Needy Families
- SNAP - Supplemental Nutrition Assistance Program
- ERDC - Employment Related Day Care

DHS Contract for Services (Joint RFP w/ RWP)

Business / Industry

Business / Industry

Business / Industry

Business / Industry

Industry Sector Groups

| | | |
|------------------------|-------------------------------------|------------|
| Advanced Manufacturing | Information Technology / E-Commerce | Healthcare |
|------------------------|-------------------------------------|------------|

Workforce & Higher Education System Partners Subcommittee

| | | | |
|-----------------------------|--------------------------|-----------------|-----------------------|
| Adult Basic Skills/Title II | People with Disabilities | Apprenticeships | Local Leadership Team |
|-----------------------------|--------------------------|-----------------|-----------------------|

WORKSOURCE ROGUE VALLEY

| | | | |
|----------------------|-----------------|-------------------|-------------------|
| Exploratory Services | Career Services | Training Services | Business Services |
|----------------------|-----------------|-------------------|-------------------|

Services for:

- All Adults, UI & Dislocated Workers, TANF, SNAP & Out-of-School Youth

Service Providers / Partners:

- ResCare (WIOA, TANF-JOBS, SNAP-OFSET)
- Oregon Employment Department
- DHS - Office of Vocational Rehabilitation Services (outstation)
- Child Care Resource Network

WSRV Operational Oversight

RWP Contract for Services (Joint RFP w/ DHS)

Strong Partnerships

LOCAL WORKFORCE DEVELOPMENT BOARD MEMBERSHIP

| WIOA Sec. 107(b)(2)(B) | | | |
|---|----------------------|-------------------------------------|--|
| Representatives of the workforce within the local area – At least 20% of the total board membership must represent the categories in this section. | | | |
| <u>Membership Category</u> Name of labor organization, CBO, etc. | <u>Member's Name</u> | <u>Nominated By</u> | <u>Term Expiration Date</u> If Vacant, Date to be Filled |
| (i) Representatives of labor organizations (for a local area in which employees are represented by labor organizations), or (for a local area in which no employees are represented by such organizations) other representatives of employees; | | | |
| Minimum of one representative (Must be nominated by local labor federations or other employee representative group.) | | | |
| SEIU | Wes Brain | So. OR Central Labor Council | 6/30/16 |
| IBEW | Jon Flegel | So. OR Central Labor Council | 6/30/17 |
| | | | |
| | | | |
| | | | |
| | | | |
| (ii) Representative of labor organization or a training director, from a joint labor-management apprenticeship program, or if no such joint program exists in the area, such a representative of an apprenticeship program in the area | | | |
| Minimum of one representative, if such a program exists in the area | | | |
| Joint Apprenticeship Training Center | Lance Corley | Not Applicable | TBD |
| | | | |
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| (iii) Representatives of community-based organizations that have demonstrated experience and expertise in addressing the employment needs of individuals with barriers to employment, including organizations that serve veterans or that provide or support competitive integrated employment for individuals with disabilities (Optional category) | | | |
| Individuals with Disabilities | TBD | Not Applicable | |
| Veterans | TBD | | |
| | | | |
| (iv) Representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth, including representatives of organizations that serve out-of-school youth (Optional category) | | | |
| | TBD | Not Applicable | |
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DRAFT

LOCAL WORKFORCE DEVELOPMENT BOARD MEMBERSHIP

WIOA Sec. 107(b)(2)(C)

Each local board shall include representatives of entities administering education and training activities in the local area.

When there is more than one local area provider of adult education and literacy activities under Title II, or multiple institutions of higher education providing workforce investment activities the CLEO must solicit nominations from those providers and institutions, respectively, in appointing the required representatives.

| <u>Membership Category</u> List Business or Agency Name | <u>Names</u> Member's Name | <u>Nominated By</u> Organization Name | <u>Term Expiration Date</u> If Vacant, Date to be Filled |
|--|---|---|---|
| A representative of eligible providers administering adult education and literacy activities under title II of WIOA | | | |
| Minimum of one representative | | | |
| Rogue Community College | Peter Angstadt | RCC | 6/30/16 |
| | | | |
| | | | |
| A representative of institutions of higher education providing workforce investment activities (including community colleges) | | | |
| Minimum of one representative | | | |
| Southern Oregon University | Roy Saigo (Sue Walsh – Provost, proxy) | SOU | 6/30/18 |
| | | | |
| | | | |
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| Representatives of local educational agencies, and of community-based organizations with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment (Optional category) | | | |
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LOCAL WORKFORCE DEVELOPMENT BOARD MEMBERSHIP

| WIOA Sec. 107(b)(2)(D) | | | |
|---|-------------------------------|--|--|
| Each local board shall include representatives of governmental and economic and community development entities serving the local area. | | | |
| <u>Membership Category</u> List Business or Agency Name | <u>Names</u> Member's Name | <u>Nominated By</u> Organization Name | <u>Term Expiration Date</u> If Vacant, Date to be Filled |
| Representatives of economic and community development entities (Minimum of one representative) | | Not applicable | |
| Southern Oregon Economic Development Inc | Ron Fox | | 6/30/17 |
| Representative from the State employment service office under the Wagner-Peyser Act serving the local area (Required) | | Not applicable | |
| Oregon Employment Department | Sherri Stratton | | 6/30/18 |
| Representative of the programs carried out under title I of the Rehabilitation Act of 1973 serving the local area [other than section 112 or part C of that title] (Required) | | Not applicable | |
| Office of Vocational Rehabilitation Division | Pete Karpa / Matthew Balkwill | | 6/30/18 |
| Representatives of agencies or entities administering programs serving the local area relating to transportation, housing, and public assistance (Optional) | | Not applicable | |
| Oregon Department of Human Services | Doug Mares | | 6/30/17 |
| Representatives of philanthropic organizations serving the local area (Optional) | | Not applicable | |
| <i>Other</i> | | Not applicable | |
| Medford School District | Brian Shumate | | 6/30/18 |
| Grants Pass School District | John Higgins | | 6/30/17 |
| Phoenix-Talent School District | Teresa Sayre | | 6/30/17 |
| Southern Oregon Education Service District | Scott Beveridge | | 6/30/18 |



BOARD MEMBERSHIP

PURPOSE

The purpose of this policy is to outline criteria and processes for Workforce Board Member appointment, and Board Member expectations in compliance with federal and state laws, regulations, policies, and guidance.

BOARD COMPOSITION AND APPOINTMENT

The Rogue Valley Workforce Consortium (RVWC), comprised of a consortium of elected officials as established by an intergovernmental agreement, serve as the chief elected officials (CLEO) for Jackson and Josephine Counties. The RVWC appoints the Rogue Workforce Partnership (RWP Workforce Board) members in accordance with the Workforce Innovation and Opportunity Act (WIOA) and the State of Oregon Workforce Programs policies to be the visionary driver of workforce development in the local area.

The RWP Workforce Board shall appoint the Workforce Board Chair and Vice-Chair as the President and Secretary-Treasurer of the RWP Corporate Directors and shall appoint an additional five to seven Workforce Board members as Corporate Directors. The five to seven members of the Workforce Board serving as Corporate Directors shall be private sector business members. Two additional Corporate Director positions will also be filled by the designated County Commissioners from Jackson and Josephine Counties who comprise the RVWC.

The RWP Corporate Directors are responsible for management and administrative work, as well as directing public and private fundraising efforts for the local workforce area.

The Partnership Agreement among the RWP Workforce Board, RWP Corporate Directors and the Rogue Valley Workforce Consortium identifies the roles and responsibilities of each board.

Workforce Board members will fall into one of three categories as defined in the WIOA: a representative of business, a representative of workforce (includes labor and community-based organizations and must be not less than 20 percent), or a representative of education and training. Workforce Board members may be appointed as a representative of more than one entity if the individual meets all the criteria for representation, including the criteria described in WIOA legislation for each entity. Workforce Board members will be appointed as necessary to maintain the appropriate balance, and must work or reside in Jackson or Josephine Counties.

NOMINATION AND APPLICATION PROCESS

Prospective members must be interviewed by the Workforce Board Chair and/or the RWP Executive Director prior to submitting an application. Prospective business or labor members must be nominated from one of the following:

- Business Representatives from a local business organization or business trade association.
- Labor Representatives of a local labor federation, from which they have also been appointed.



BOARD MEMBERSHIP

All nominations must be submitted to the RWP Executive Director to forward onto the RWP Corporate Directors for review and forwarding to the RVWC. As seats become available, the RVWC will review, consider and appoint nominees.

BOARD MEMBER TERMS, REMOVALS AND VACANCIES

Workforce Board members serve renewable three-year terms from the date of appointment, except that initial appointments made in 2016 shall be staggered. Workforce Board members who no longer hold the position or status that made them eligible local workforce board members must resign with a written letter or email to the RWP Executive Director or be removed by the CLEOs immediately as a representative of that entity (e.g., no longer work in the private sector, or no longer with an educational institution, etc.). Additionally, Workforce Board members must be removed by the CLEOs if any of the following occurs:

- Documented violation of conflict of interest;
- Documented proof of fraud and/or abuse; and
- Other factors as outlined in the RWP Workforce Board bylaws.

If a Board seat is vacated prior to the end of the three-year term, a new member will be appointed using the process above, and will serve for the remainder of the term.

RWP-Workforce Board vacancies are adhered to in accordance with the state of Oregon Workforce Program policies.

QUORUM

The RWP Workforce Board Quorum is defined as:

- 51% of the membership (excluding vacancies) AND
- Of those members in attendance, no fewer than 51% are business representatives.

MEMBER EXPECTATIONS AND RELATED

Once appointed, Workforce Board members must attend at least 50% of the Board Meetings, including but not limited to new board member orientation and quarterly meetings. Any Workforce Board member failing to meet this criterion will be subject to removal. Workforce Board members must contact the Executive Director or other designated staff if they are unable to attend a meeting. The RWP Workforce Board prohibits the use of proxies, except in special circumstances approved by the RWP Corporate Directors.

Workforce Board member must actively use their expertise, energy and talents to assist in meeting the RWP Workforce Board’s stated mission and vision. Workforce Board members may participate in one or more ad-hoc advisory group.

Approved: _____
RWP Chair

Date: _____

**LOCAL WORKFORCE DEVELOPMENT BOARD
CERTIFICATION REQUEST**

We certify that we are authorized to request certification of the Rogue Workforce Partnership Workforce Development Board for the Rogue Valley. This certification is for the Workforce Innovation and Opportunity Act period ending June 30, 2018.

This request includes documentation demonstrating the Local Workforce Development Board Membership composition.

Submitted on behalf of the Local Elected Official(s) for this Local Workforce Development Area.

(Signature – Local Elected Official)

(Date)

(Printed Name and Title)

(Signature – Local Elected Official)

(Date)

(Printed Name and Title)